



LABOR MARKET DIMENSIONS

**A Monthly Report on the Dynamics of
the Labor Market in Maryland**

September, 1990

**Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information**

**1100 North Eutaw Street
Baltimore, Maryland 21201**

**William Donald Schaefer, Governor
J. Randall Evans, Secretary**

LABOR MARKET DIMENSIONS
SEPTEMBER, 1990

MARYLAND

Maryland's labor market exhibited rather traditional seasonal patterns in September, led almost exclusively by back-to-school activities. Aside from the normal round of seasonal layoffs, however, some weak spots surfaced in selected industries during September, resulting in additional layoffs. Movement in the labor force, however, helped to maintain the statewide unemployment rate at 4.5 percent for the third consecutive month. Nationally, the jobless rate also remained unchanged in September, holding at 5.4 percent.

A relatively stable unemployment rate is the norm for September. Last year, the jobless rate although much lower at 3.7 percent in September was up from August's rate of 3.6 percent.

September's static jobless rate actually masked the overall level of activity in the job market over the month. During September, employment in the state dropped by nearly 22,200 persons. The movement of workers out of the job market compensated for this decline and, at the same time, reduced the pool of unemployed workers by slightly more than 700 persons to 114,054 in September.

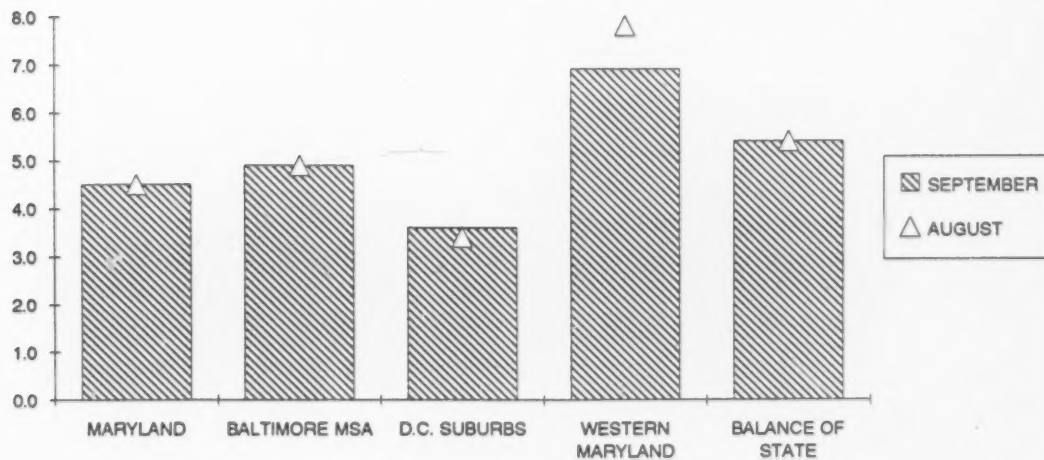
	September 1990	August 1990	September 1989
Civilian Labor Force	2,544,925	2,567,815	2,519,875
Total Employment	2,430,871	2,453,035	2,426,515
Total Unemployment	114,054	114,780	93,360
Unemployment Rate	4.5	4.5	3.7
National Civilian Unemployment Rate	5.4	5.4	5.1

The termination of seasonal employment and the exodus of summer workers from the job market is a normal occurrence in September. Another habitual event, which is often obscured by these movements but is still worth mention, is the re-entrance and re-employment of workers in state and local educational facilities.

TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

Region	September 1990		August 1990	
	Number	Rate	Number	Rate
Maryland	114,054	4.5	114,780	4.5
Baltimore Metropolitan Area	59,041	4.9	59,751	4.9
Maryland's D.C. Suburbs	35,983	3.6	34,555	3.4
Western Maryland	7,256	6.9	8,421	7.8
Balance of State	11,774	5.4	12,052	5.4

UNEMPLOYMENT RATES



INDUSTRY DEVELOPMENTS

Nonagricultural payroll employment rose to 2,173,600 in September, up 3,700 from August. All gains were attributed to a seasonal increase in government, as every major industry group in the private sector, except mining, declined. Much of the slowdown was seasonal in nature, but general economic weakness was also a factor.

In the goods-producing sector, construction decelerated by 1,400 jobs, while manufacturing fell by 800. Manufacturing's over the month losses were most notable in industrial machinery and printing and publishing. Among service-producers, the biggest decline (-6,100), was reported in the services industry group, led primarily by seasonal reductions in amusement and recreation services, and hotels and motels. Trade was down 4,200, as retail fell 3,700 and wholesale dropped 500. A seasonal decline in restaurant employment was largely responsible for retail's downswing. All three divisions in finance, insurance, and real estate receded, as the industry lost 1,600 jobs. Transportation, communication, and public utilities was down 200. The only bright spot in the labor market was government, which netted a total of 18,000 jobs in September. Federal employment fell by 200, state government rose 4,600, and local government was up 13,600, as public education resumed for the fall.

Since last September, nonfarm payroll employment has increased by 20,400, or less than 1.0 percent. All three divisions of government grew, while in the private sector, industry performance was mixed. Services added the most new jobs, with health services an important factor. Retail trade rose (with most of the gain in restaurants), while wholesale trade declined. Transportation, communication, and public utilities was up, as was construction. Finance, insurance, and real estate edged downward, while manufacturing dropped significantly. Factory employment fell off considerably in industrial machinery and electronic equipment. Mining was unchanged over the year.

The average workweek for manufacturing production workers increased 0.3 hour to 41.2 hours in September. Hours for durable goods workers rose 0.4 to 42.0, while those for nondurable goods workers were up 0.2 to 40.5. In the Baltimore Metropolitan Area, weekly hours for production workers averaged 41.1, up 0.2 hour over the month.

Average hourly earnings for factory production workers rose \$.10 to \$11.69 in September. In the durable goods sector, wages climbed \$.14 to \$12.33 an hour. Earnings in nondurable goods edged up \$.07 to \$11.10. Following the gains in both the workweek and hourly earnings, average weekly pay improved by \$7.60 to \$481.63. Production workers in the Baltimore Metropolitan Area saw their weekly pay increase an average of \$6.94 to \$501.42, as hourly earnings were up \$.11 to \$12.20.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
SEPTEMBER 1990

Major Industry Group	September 1990	August 1990	September 1989
Total Nonagricultural Employment	2173.6	2169.9	2153.2
Goods Producing	373.6	375.8	377.6
Mining	1.7	1.7	1.7
Construction	168.3	169.7	166.9
Manufacturing	203.6	204.4	209.0
Durable Goods	104.8	105.5	110.0
Nondurable Goods	98.8	98.9	99.0
Service Producing	1800.0	1794.1	1775.6
Transportation & Public Utilities	102.4	102.6	101.0
Trade	544.6	548.8	541.3
Wholesale Trade	114.0	114.5	114.2
Retail Trade	430.6	434.3	427.1
Finance, Insurance, & Real Estate	132.4	134.0	132.5
Services	605.3	611.4	596.8
Total Government	415.3	397.3	404.0
Federal	137.5	137.7	134.9
State	96.8	92.2	93.9
Local	181.0	167.4	175.2

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
SEPTEMBER 1990

Major Industry Grouping	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	Sept. 1990	Aug. 1990	Sept. 1990	Aug. 1990	Sept. 1990	Aug. 1990
MARYLAND						
Manufacturing			\$481.63	\$474.03	\$11.69	\$11.59
Durable Goods	41.2	40.9				
Lumber and Wood Products	42.0	41.6	517.86	506.69	12.33	12.18
Stone, Clay & Glass Products	39.6	40.4	346.50	361.58	8.75	8.95
Primary Metal Industries	44.3	43.1	505.46	486.60	11.41	11.29
Blast Furnaces	44.1	43.7	705.60	684.34	16.00	15.66
Fabricated Metals	44.6	44.0	720.29	690.80	16.15	15.70
Industrial Machinery	40.3	40.0	419.12	413.60	10.40	10.34
Electronic Equipment	41.3	40.3	506.34	482.79	12.26	11.98
Transportation Equipment	44.8	44.2	411.26	408.85	9.18	9.25
Instruments and Related Products	40.1	39.5	607.52	598.03	15.15	15.14
Miscellaneous Manufacturing Indus.	42.0	43.0	581.70	580.50	13.85	13.50
	39.6	39.5	370.26	367.35	9.35	9.30
Nondurable Goods	40.5	40.3	449.55	444.51	11.10	11.03
Food and Kindred Products	42.0	42.0	436.80	425.88	10.40	10.14
Textile Mill, Apparel	36.1	36.3	274.36	277.70	7.60	7.65
Paper and Allied Products	42.0	41.7	499.80	494.15	11.90	11.85
Printing and Publishing	37.5	37.4	487.50	495.55	13.00	13.25
Chemicals and Allied Products	43.3	42.6	553.81	534.63	12.79	12.55
Rubber and Plastic Products	43.8	43.7	440.19	432.63	10.05	9.90
BALTIMORE METROPOLITAN AREA						
Manufacturing			\$501.42	\$494.48	\$12.20	\$12.09
Durable Goods	41.1	40.9	533.23	526.12	12.88	12.77
Nondurable Goods	40.7	40.6	466.42	461.22	11.46	11.36

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Following statewide trends, unemployment in the Baltimore Metro Area, while declining by approximately 700 persons, remained unchanged at 4.9 percent in September. Within the Baltimore Metro Area, local unemployment rates in September formed a wide range, with Queen Anne's the lowest at 2.7 percent and Baltimore City the highest at 7.5 percent. Relatively little movement was visible at the local level with the exception of Harford County where unemployment dropped from 4.4 percent to 4.0 percent as summer workers continued to exit the job market. Aside from some economically induced layoffs in construction, real estate and finance, the BMA's industrial payrolls reacted as expected during September with seasonal layoffs scattered throughout the trade and services sectors.

MARYLAND'S D.C. AREA SUBURBS

Maryland's D.C. suburbs, the only region in the state to experience rising joblessness, added more than 1,400 persons to their unemployment rolls during September. With this increase, unemployment in the region inched up from 3.4 percent to 3.6 percent over the month. The regional perspective was influenced primarily by local economics in Frederick, Montgomery, and Prince George's counties. In Frederick, increased claims activity in manufacturing pushed unemployment up from 4.8 percent to 5.0 percent. Meanwhile, in Montgomery and Prince George's, local unemployment rates rose to 2.8 percent and 4.1 percent, respectively, in response to layoffs in construction, trade, and services.

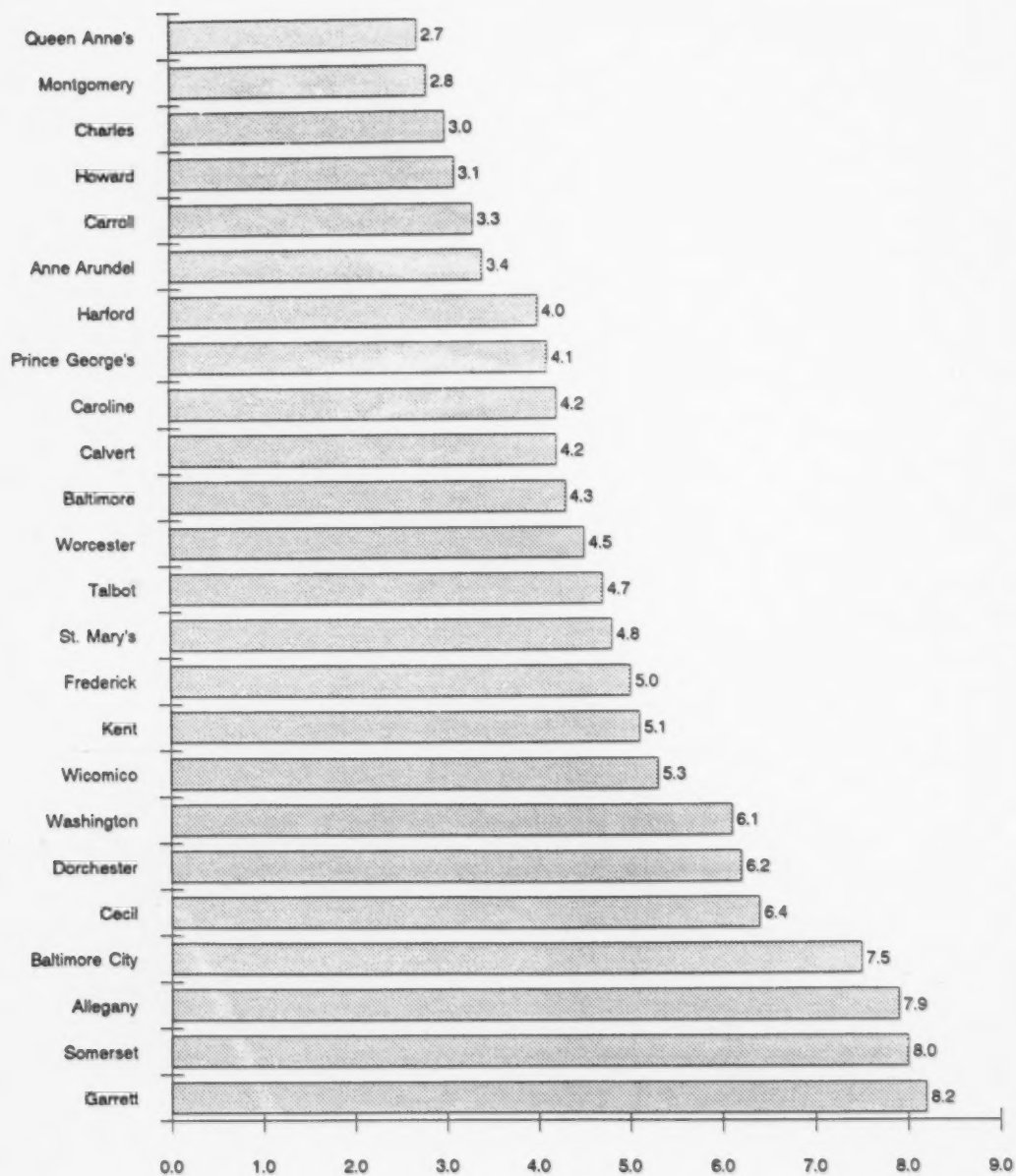
WESTERN MARYLAND

Unemployment in the western portion of the state, estimated at 6.9 percent, held the highest position in the regional ranking during September. Even so, the region's jobless rate was almost a full percentage point below August's level of 7.8 percent. The withdrawal of slightly more than 2,700 workers from the job market was the primary factor responsible for reducing the area's jobless rolls by nearly 1,200 persons to 7,256 in September. Monthly labor force declines contributed to noticeable declines in jobless rates in both Allegany and Washington counties. In Garrett County, on the other hand, employment declines were proportionately higher than those in the labor force. As a result, unemployment in the county inched up slightly from 8.1 percent in August to 8.2 percent in September.

BALANCE OF STATE

The unemployment rate on the Eastern Shore stabilized in September, holding at 5.4 percent. Some noticeable changes, however, were recorded locally. In Dorchester, manufacturing layoffs contributed to increased joblessness, pushing local unemployment up from 5.7 percent to 6.2 percent. In St. Mary's where defense-related industries started to feel the economic pinch, an additional 132 county residents joined the unemployment rolls, causing joblessness to rise to 4.8 percent in September. Meanwhile, in Worcester, the seasonal drop-off in tourist activities lowered employment by slightly more than 4,000 persons. While the bulk of these workers opted to leave the job market, an unemployment increase of about 100 raised local joblessness from 3.5 percent to 4.5 percent.

LOCAL UNEMPLOYMENT RATES SEPTEMBER 1990



NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--SEPTEMBER 1990

Major Industry Grouping	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	Sept. 1990	Aug. 1990	Sept. 1990	Aug. 1990	Sept. 1990	Aug. 1990	Sept. 1990	Aug. 1990
Total Nonagricultural Employment	1153.8	1150.6	785.5	779.2	92.2	92.6	150.1	150.6
Goods Producing	205.6	206.4	110.1	110.7	23.3	23.3	35.2	35.7
Mining	0.3	0.3	0.5	0.5	0.7	0.7	0.2	0.2
Construction	78.1	78.9	72.3	72.5	6.9	6.9	10.5	10.5
Manufacturing	127.2	127.2	37.3	37.7	15.7	15.7	24.5	25.0
Durable Goods	70.3	70.5	18.8	19.2	7.3	7.3	9.2	9.3
Nondurable Goods	56.9	56.7	18.5	18.5	8.4	8.4	15.3	15.7
Service Producing	948.2	944.2	675.4	668.5	68.9	69.3	114.9	114.9
Transportation & Public Utilities	57.2	57.2	31.6	31.7	5.3	5.4	8.1	8.1
Trade	281.2	281.9	200.7	201.9	25.6	25.7	41.0	41.5
Wholesale Trade	68.1	67.9	35.4	35.7	4.4	4.4	6.1	6.2
Retail Trade	213.1	214.0	165.3	166.2	21.2	21.3	34.9	35.3
Finance, Insurance, & Real Estate	76.9	77.6	45.8	46.6	3.3	3.3	5.3	5.7
Services	322.6	322.1	228.8	231.9	20.4	20.1	34.2	35.2
Total Government	210.3	205.4	168.5	156.4	14.3	14.8	26.3	24.4
Federal	56.0	56.6	74.8	74.9	1.9	1.9	7.1	7.0
State	67.4	66.5	20.2	16.2	4.8	4.8	5.3	4.6
Local	86.9	82.3	73.5	65.3	7.6	8.1	13.9	12.8

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

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MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 NORTH EUTAW STREET
BALTIMORE, MARYLAND 21201

STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

SEPTEMBER 1990

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE	
	SEPTEMBER	AUGUST*	SEPTEMBER	AUGUST*	SEPTEMBER	AUGUST*	SEPTEMBER	AUGUST*
SEPTEMBER 1989								
MARYLAND	2,544,925	2,567,815	2,430,871	2,453,035	114,054	114,780	4.5	4.5
BALTIMORE METROPOLITAN AREA	1,214,073	1,225,730	1,155,032	1,165,979	59,041	59,751	4.9	4.9
BALTIMORE CITY	346,337	349,614	320,429	323,466	25,908	26,148	7.5	7.5
ANNE ARUNDEL	215,930	218,015	208,645	210,622	7,285	7,393	3.4	3.4
BALTIMORE	394,315	397,839	377,199	380,774	17,116	17,065	4.3	4.3
CARROLL	63,308	63,898	61,217	61,797	2,091	2,101	3.3	3.3
HARFORD	83,548	84,742	80,229	80,989	3,319	3,753	4.0	4.4
HOWARD	94,764	95,571	91,871	92,742	2,893	2,829	3.1	3.0
QUEEN ANNE'S	15,872	16,053	15,443	15,589	429	464	2.7	2.9
D. C. AREA	1,006,871	1,011,359	970,888	976,804	35,983	34,555	3.6	3.4
CALVERT	23,538	23,685	22,544	22,681	994	1,004	4.2	4.2
CHARLES	47,703	48,051	46,253	46,535	1,450	1,516	3.0	3.2
FREDERICK	78,633	78,966	74,720	75,175	3,913	3,791	5.0	4.8
MONTGOMERY	431,213	433,247	419,181	421,735	12,032	11,512	2.8	2.7
PRINCE GEORGE'S	425,784	427,409	408,190	410,678	17,594	16,731	4.1	3.9
WESTERN MARYLAND	105,544	108,260	98,288	99,839	7,256	8,421	6.9	7.8
ALLEGANY	32,802	33,208	30,226	30,285	2,576	2,923	7.9	8.8
GARRETT	12,807	13,119	11,762	12,059	1,045	1,060	8.2	8.1
WASHINGTON	59,935	61,933	56,300	57,495	3,635	4,438	6.1	7.2
BALANCE OF STATE	218,436	222,466	206,662	210,414	11,774	12,052	5.4	5.4
CAROLINE	14,536	14,326	13,928	13,721	608	605	4.2	4.2
CECIL	35,759	36,575	33,456	34,140	2,303	2,435	6.4	6.7
DORCHESTER	18,260	17,949	17,122	16,934	1,138	1,015	6.2	5.7
KENT	9,742	9,484	9,250	8,996	492	488	5.1	5.1
ST. MARY'S	42,202	42,329	40,164	40,423	2,038	1,906	4.8	4.5
SOMERSET	13,078	13,491	12,035	12,308	1,043	1,183	8.0	8.8
TALBOT	18,151	17,948	17,301	16,964	850	984	4.7	5.5
WICOMICO	41,242	40,981	39,074	38,575	2,168	2,406	5.3	5.9
WORCESTER	25,466	29,383	24,332	28,353	1,134	1,030	4.5	3.5
UNITED STATES	124,779,000	126,012,000	117,961,000	119,174,000	6,818,000	6,837,000	5.4	5.4
								5.1

*Estimates for the state are revised.

Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

 Maryland
Department of Economic &
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Maryland

Department of Economic &
Employment Development

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LABOR MARKET DIMENSIONS
OCTOBER, 1990

MARYLAND

Maryland's labor market statistics sent out mixed signals in October. Employment, while declining over the month, failed to produce an increase in the jobless rate. The movement of workers out of the job market was the primary factor responsible for maintaining Maryland's unemployment rate on an even keel. For the fourth consecutive month, Maryland's unemployment rate remained unchanged at 4.5 percent during October.

Nationally, the jobless rate ebbed slightly from 5.5 percent in September to 5.4 in October.

During October, the number of workers in the state declined by 15,443 to 2,415,824. With this decline, statewide employment dropped to its second lowest level recorded thus far this year. The impact of this decline on the unemployment rolls, however, was negligible because of an almost identical drop in the labor force over the month. The exodus of an estimated 15,373 participants from the job market helped to hold down the jobless increase to just 70 people during October.

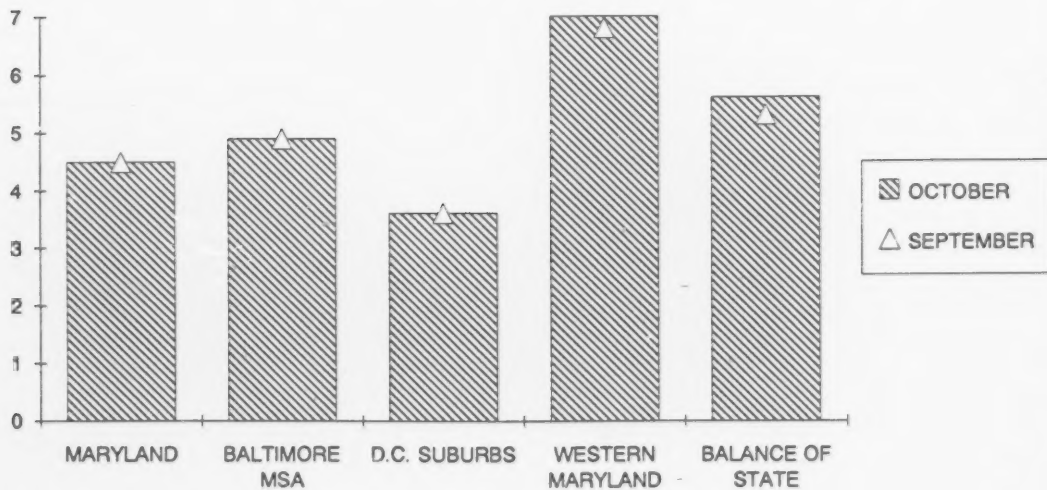
	October 1990	September 1990	October 1989
Civilian Labor Force	2,529,766	2,545,139	2,522,809
Total Employment	2,415,824	2,431,267	2,440,195
Total Unemployment	113,942	113,872	82,614
Unemployment Rate	4.5	4.5	3.3
National Civilian Unemployment Rate	5.4	5.5	5.0

From an historical perspective, October's labor market trends have tended to be somewhat unpredictable, largely because of seasonal factors. For the past few years, however, both labor force and employment levels have risen while unemployment indicators have declined. Last year, October's unemployment rate stood at 3.3 percent, following a drop of 0.4 percentage points from September.

TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

Region	October 1990		September 1990	
	Number	Rate	Number	Rate
Maryland	113,942	4.5	113,872	4.5
Baltimore Metropolitan Area	58,746	4.9	59,023	4.9
Maryland's D.C. Suburbs	35,785	3.6	35,984	3.6
Western Maryland	7,367	7.0	7,218	6.8
Balance of State	12,045	5.6	11,648	5.3

UNEMPLOYMENT RATES



INDUSTRY DEVELOPMENTS

While the up and down movements in industrial payrolls over the past few months have made it difficult to pinpoint underlying trends, it does appear that local employers may be tightening the reins somewhat in response to the weakening in the national economy. Activity on Maryland's industrial payrolls during October was indicative of the recent slowing in the economy. Very little new job generation occurred during October. The overall increase in industrial employment was, instead, the result of continuing recall activity in state and local education facilities. While education recalls contributed some 14,000 jobs during October, the impact of this gain on overall employment was diminished by layoff activity elsewhere on industry payrolls.

On the goods-producing side of the economy, job cutbacks lowered employment totals in both the manufacturing and construction sectors. Job losses in manufacturing, most of which were seasonal, were limited to just 200. The only occurrence out of the norm was the report of strike activity in industrial machinery and equipment. In construction, on the other hand, the employment level was depressed by the loss of an estimated 1,500 jobs. While employment reductions were recorded in all phases of construction, about two-thirds of the overall industry decline resulted from layoffs among general building contractors.

On private sector payrolls, the employment situation was driven primarily by seasonal layoffs, particularly in the trade and services industries. Some layoffs, such as those in eating and drinking places and auto dealers, however, exceeded seasonal expectations. In the real estate industry, seasonal economics, combined with the general slowdown in the housing market, were responsible for reduced employment levels. On the upside, employment increased over the month in general merchandise stores, food stores, health services, and educational services.

Production workers in Maryland's manufacturing industries experienced a drop in weekly earnings during October, primarily due to a reduction in overtime hours. During October, working an average of 41.1 hours per week yielded a weekly paycheck of \$479.23, down \$4.81 from September's estimate. Even with this decline, production workers are earning more than they did last year when a 41.6 hour workweek resulted in weekly earnings of \$468.00.

In the durable goods component, monthly trends were quite different. Although the hourly wage dropped by \$.01 during October, a lengthening of the workweek from 42.1 to 42.3 hours boosted weekly earnings by slightly more than \$2.00 to \$521.14 per week. Within durable goods, weekly wages increased by the highest margin, of \$16.31 to \$442.66, in electronic equipment.

In nondurable goods, the average weekly wage dropped from \$451.58 to \$442.30 as worker hours were reduced to 40.1 and hourly earnings were cut back to \$11.03. Weekly hours and earnings dropped in all nondurable goods industries with the exception of textile mill and chemical products.

In the Baltimore Metro Area, a shorter workweek lowered weekly earnings from \$503.93 to \$498.95. In durable goods, although workweeks increased marginally, a drop in hourly earnings reduced weekly paychecks by \$.39 to \$536.29. In nondurable industries, a shortened workweek and lower hourly pay rates caused weekly draws to drop by \$7.00 to \$458.94 in October.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
OCTOBER 1990

Major Industry Group	October 1990	September 1990	October 1989
Total Nonagricultural Employment	2,181.1	2,174.6	2,165.6
Goods Producing	372.3	374.0	377.3
Mining	1.7	1.7	1.7
Construction	167.0	168.5	166.8
Manufacturing	203.6	203.8	208.8
Durable Goods	104.9	105.1	110.1
Nondurable Goods	98.7	98.7	98.7
Service Producing	1,808.8	1,800.6	1,788.3
Transportation & Public Utilities	102.8	103.0	101.2
Trade	542.3	545.3	540.8
Wholesale Trade	114.0	114.1	114.2
Retail Trade	428.3	431.2	426.6
Finance, Insurance, & Real Estate	132.2	132.5	131.8
Services	604.6	605.6	596.6
Total Government	426.9	414.2	417.9
Federal	136.1	136.6	134.7
State	99.0	96.7	97.3
Local	191.8	180.9	185.9

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

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	Oct. 1990	Sept. 1990	Oct. 1990	Sept. 1990	Oct. 1990	Sept. 1990
MARYLAND						
Manufacturing	41.1	41.3	\$479.23	\$484.04	\$11.66	\$11.72
Durable Goods	42.3	42.1	521.14	519.09	12.32	12.33
Lumber and Wood Products	39.4	39.8	355.39	352.23	9.02	8.85
Stone, Clay & Glass Products	43.7	44.4	495.56	508.38	11.34	11.45
Primary Metal Industries	43.8	44.3	691.60	701.71	15.79	15.84
Blast Furnaces	44.1	44.8	701.19	715.46	15.90	15.97
Fabricated Metals	40.8	40.4	416.57	424.20	10.21	10.50
Industrial Machinery	40.9	41.5	502.25	510.87	12.28	12.31
Electronic Equipment	46.4	45.5	442.66	426.34	9.54	9.37
Transportation Equipment	41.1	39.9	620.61	604.49	15.10	15.15
Instruments and Related Products	42.5	42.0	588.63	579.60	13.85	13.80
Miscellaneous Manufacturing Indus.	40.1	39.7	380.95	371.20	9.50	9.35
Nondurable Goods	40.1	40.5	442.30	451.58	11.03	11.15
Food and Kindred Products	41.3	42.3	418.78	435.69	10.14	10.30
Textile Mill, Apparel	36.1	35.6	276.17	270.56	7.65	7.60
Paper and Allied Products	41.4	41.9	484.38	498.61	11.70	11.90
Printing and Publishing	37.1	37.7	489.72	501.41	13.20	13.30
Chemicals and Allied Products	43.3	43.3	554.24	553.81	12.80	12.79
Rubber and Plastic Products	42.6	43.7	417.48	434.82	9.80	9.95
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.1	41.3	\$498.95	\$503.93	\$12.14	\$12.18
Durable Goods	41.8	41.7	536.29	536.68	12.83	12.87
Nondurable Goods	40.4	40.8	458.94	465.94	11.36	11.42

BALTIMORE METROPOLITAN AREA

Following statewide trends, unemployment in the Baltimore Metro Area remained unchanged at 4.9 percent even though a drop in the labor force helped to reduce the jobless rolls by nearly 300 people. As was true statewide, this marks the fourth consecutive month that unemployment in the region has failed to move. Last October, just 3.5 percent of the region's labor force participants were counted on the jobless rolls. Local unemployment rates remained relatively static over the month. The most noteworthy movement occurred in Harford County where the addition of about 200 persons to the unemployment rolls increased joblessness from 4.0 percent to 4.2 percent.

MARYLAND D.C. AREA SUBURBS

Unemployment in Maryland's D.C. suburbs, also holding steady at 3.6 percent over the month, ranked as the lowest in the state. Within the suburban area, unemployment in Charles County rose from 3.0 percent to 3.3 percent in response to layoffs in the construction industry. In Frederick County, on the other hand, workers exiting the job market helped to reduce the level of unemployment by nearly 200 persons. With this decline, the county's unemployment rate dropped back from 4.9 percent to 4.7 percent.

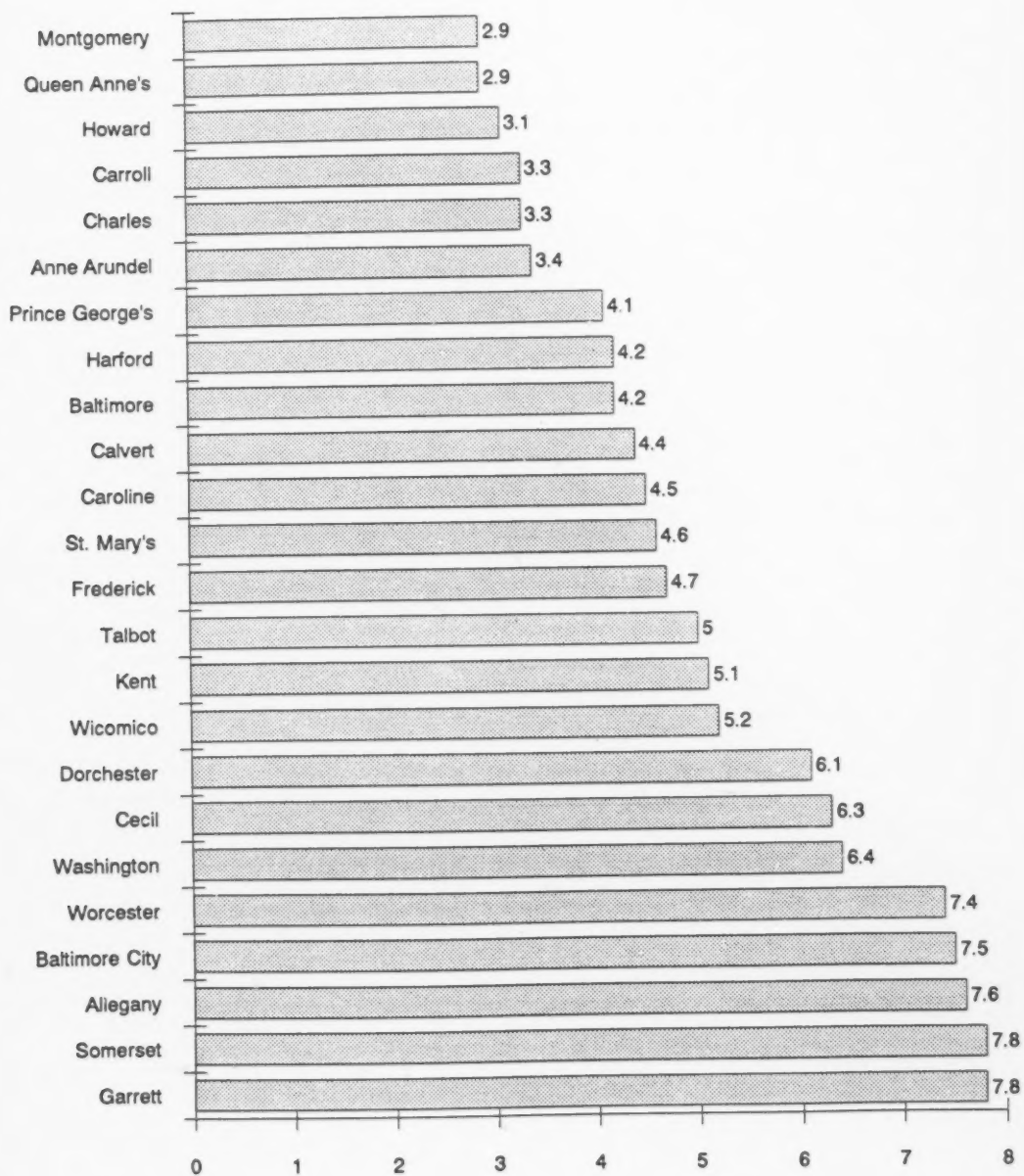
WESTERN MARYLAND

Unemployment in the western portion of the state increased slightly over the month from 6.8 percent to 7.0 percent. Unlike other regions in the state, labor market activity in Western Maryland during October reflected increases in both the labor force and employment levels. Gains in employment, however, failed to keep pace with expansion in the labor force. As a result, an additional 150 people found themselves jobless during October. The region's jobless increase was restricted solely to Washington County where unemployment rose to 6.4 percent in October, up from 6.1 percent in September.

BALANCE OF STATE

Joblessness on the Eastern Shore and in Southern Maryland left 5.6 percent of the region's work force idle during October, up from 5.3 percent in September. The economic diversity in the region was apparent in the movement of local jobless rates over the month. Worcester, one of the counties in the region most affected by seasonal employment changes, experienced a large, yet typical, increase in joblessness. With slightly more than 400 workers joining the ranks of the unemployed during October, the county's unemployment rate rose sharply from 4.5 percent to 7.4 percent.

LOCAL UNEMPLOYMENT RATES--OCTOBER 1990



NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--OCTOBER 1990

Major Industry Grouping	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	Oct. 1990	Sept. 1990	Oct. 1990	Sept. 1990	Oct. 1990	Sept. 1990	Oct. 1990	Sept. 1990
Total Nonagricultural Employment	1,159.0	1,155.2	788.5	786.3	93.3	92.4	145.7	150.2
Goods Producing	205.2	206.1	108.8	109.7	23.5	23.3	35.0	35.3
Mining	0.3	0.3	0.5	0.5	0.7	0.7	0.2	0.2
Construction	78.2	78.4	71.1	72.1	7.0	6.9	10.4	10.5
Manufacturing	126.7	127.4	37.2	37.1	15.8	15.7	24.4	24.6
Durable Goods	69.8	70.4	18.8	18.7	7.3	7.3	9.3	9.3
Nondurable Goods	56.9	57.0	18.4	18.4	8.5	8.4	15.1	15.3
Service Producing	953.8	949.1	679.7	676.6	69.8	69.1	110.7	114.9
Transportation & Public Utilities	58.0	57.5	32.7	32.3	5.4	5.4	8.0	8.1
Trade	279.8	282.0	200.3	200.7	25.6	25.6	37.7	41.0
Wholesale Trade	67.6	68.1	35.5	35.4	4.4	4.4	6.1	6.1
Retail Trade	212.2	213.9	164.8	165.3	21.2	21.2	31.6	34.9
Finance, Insurance, & Real Estate	76.7	76.9	45.8	46.0	3.3	3.3	5.2	5.3
Services	323.6	323.3	228.9	229.2	20.3	20.3	32.7	34.3
Total Government	215.7	209.4	172.0	168.4	15.2	14.5	27.1	26.2
Federal	55.5	56.0	74.4	74.5	1.9	1.9	6.9	6.9
State	67.3	67.0	21.4	20.2	4.9	4.9	5.7	5.3
Local	92.9	86.4	76.2	73.7	8.4	7.7	14.5	14.0

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 NORTH EUTAW STREET
BALTIMORE, MARYLAND 21201

STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

OCTOBER 1990

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE	
	OCTOBER	SEPTEMBER*	OCTOBER	SEPTEMBER*	OCTOBER	SEPTEMBER*	OCTOBER	SEPTEMBER*
MARYLAND	2,529,766	2,545,139	2,415,824	2,431,267	113,942	113,872	4.5	4.5
BALTIMORE METROPOLITAN AREA	1,210,265	1,214,587	1,151,519	1,155,564	58,746	59,023	4.9	4.9
BALTIMORE CITY	345,209	346,521	319,454	320,577	25,755	25,944	7.5	7.5
ANNE ARUNDEL	215,427	216,043	208,010	208,741	7,417	7,302	3.4	3.4
BALTIMORE	392,701	394,465	376,052	377,373	16,649	17,092	4.2	4.3
CARROLL	63,087	63,329	61,031	61,245	2,056	2,084	3.3	3.3
HARFORD	83,471	83,566	79,985	80,265	3,486	3,301	4.0	4.0
HOWARD	94,514	94,778	91,592	91,914	2,922	2,864	3.1	3.0
QUEEN ANNE'S	15,857	15,887	15,396	15,450	461	437	2.9	2.8
D. C. AREA	1,000,140	1,006,515	964,355	970,531	35,785	35,984	3.6	3.6
CALVERT	23,420	23,544	22,392	22,536	1,028	1,008	4.4	4.3
CHARLES	47,518	47,686	45,942	46,236	1,576	1,450	3.3	3.0
FREDERICK	77,917	78,571	74,217	74,692	3,700	3,879	4.7	4.9
MONTGOMERY	428,622	431,066	416,360	419,027	12,262	12,039	2.9	2.8
PRINCE GEORGE'S	422,664	425,646	405,444	408,040	17,220	17,606	4.1	4.1
WESTERN MARYLAND	105,892	105,646	98,525	98,428	7,367	7,218	7.0	6.8
ALLEGANY	32,709	32,829	30,228	30,271	2,481	2,558	7.6	7.8
GARRETT	12,676	12,809	11,684	11,782	992	1,027	7.8	8.0
WASHINGTON	60,507	60,008	56,613	56,375	3,894	3,633	6.4	6.1
BALANCE OF STATE	213,469	218,392	201,424	206,744	12,045	11,648	5.6	5.3
CAROLINE	14,285	14,534	13,644	13,926	641	608	4.5	4.2
CECIL	35,966	35,874	33,703	33,661	2,263	2,213	6.3	6.2
DORCHESTER	18,230	18,265	17,123	17,131	1,107	1,134	6.1	6.2
KENT	9,722	9,746	9,224	9,254	498	492	5.1	5.0
ST. MARY'S	42,209	42,033	40,250	40,003	1,959	2,030	4.6	4.8
SOMERSET	12,986	13,085	11,969	12,050	1,017	1,035	7.8	7.9
TALBOT	18,179	18,148	17,274	17,298	905	850	5.0	4.7
WICOMICO	40,965	41,240	38,849	39,088	2,116	2,152	5.2	5.2
WORCESTER	20,927	25,467	19,388	24,333	1,539	1,134	7.4	4.5
UNITED STATES ¹	125,020,000	124,779,000	118,299,000	117,961,000	6,722,000	6,818,000	5.4	5.5
								5.0

*Estimates for the state are revised.

¹ Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

 Maryland
Department of Economic &
Employment Development

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Maryland

Department of Economic &
Employment Development

LABOR MARKET DIMENSIONS

**A Monthly Report on the Dynamics of
the Labor Market in Maryland**

November, 1990

**Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201**

**William Donald Schaefer, Governor
J. Randall Evans, Secretary**

LABOR MARKET DIMENSIONS
NOVEMBER, 1990

MARYLAND

After months of apparent stability, the movement in November's labor force statistics provided the first clear indication that the slowing in the national economy is impacting upon Maryland's economic performance. For the first time in nearly three years, Maryland's jobless rate topped the 5.0 percent mark, rising from 4.5 percent in October to 5.3 percent in November.

In reaction to the gulf crisis, radical jumps in oil prices and significantly reduced consumer spending, national unemployment also climbed from 5.4 percent to 5.8 percent.

With November's upswing, the gap between statewide and national unemployment narrowed to just 0.5 percentage points.

Normally, the hiring of temporary workers for the holiday season tends to offset any seasonal employment declines which may occur. This year, however, wavering market conditions contributed to a relatively large decline in employment. During November, employment declined by 49,360 persons, from 2,415,622 to 2,366,262. While nearly two-thirds of this decline was absorbed by the withdrawal of workers from the job market, the remaining employment loss was reflected in unemployment.

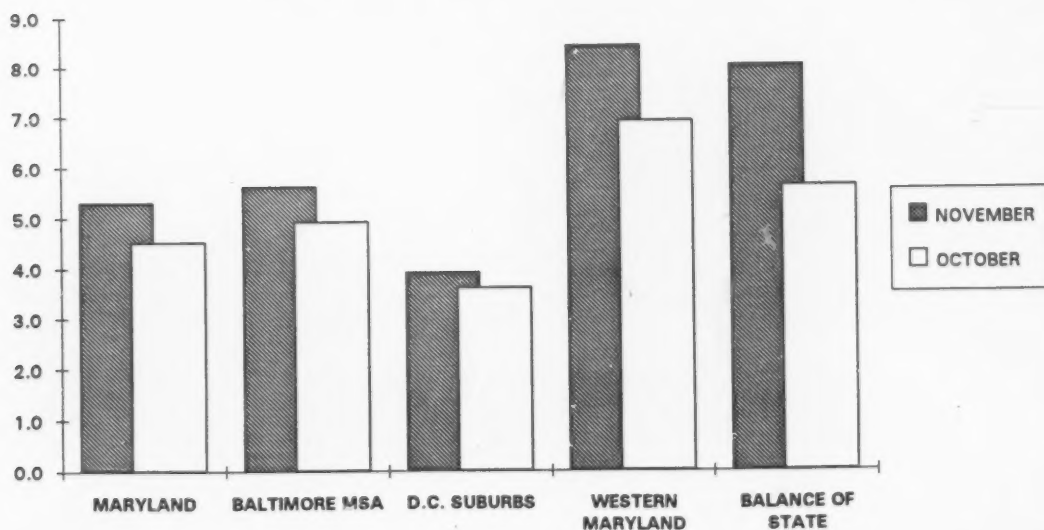
	November 1990	October 1990	November 1989
Civilian Labor Force	2,497,829	2,529,486	2,533,602
Total Employment	2,366,262	2,415,622	2,451,836
Total Unemployment	131,567	113,864	81,766
Unemployment Rate	5.3	4.5	3.2
National Civilian Unemployment Rate	5.8	5.4	5.2

The deterioration in the job market is particularly evident when making over-the-year comparisons. Since last year, statewide employment has declined by more than 85,500 persons while unemployment has risen by 49,801.

TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

Region	November 1990		October 1990	
	Number	Rate	Number	Rate
Maryland	131,567	5.3	113,864	4.5
Baltimore Metropolitan Area	67,012	5.6	58,859	4.9
Maryland's D.C. Suburbs	38,906	3.9	35,723	3.6
Western Maryland	8,820	8.4	7,353	6.9
Balance of State	16,829	8.0	11,931	5.6

UNEMPLOYMENT RATES--NOVEMBER 1990



INDUSTRY DEVELOPMENTS

Activity on Maryland's industrial payrolls was influenced by a combination of both seasonal and economic factors. Overall, total employment did rise by about 7,200 jobs.

The overall outlook in goods-producing industries during November was dampened by performance in the construction industry where the normal round of seasonal furloughs was magnified by the continuing slowdown in residential and commercial building activity. A net loss of 2,400 jobs during November lowered employment in this industry line to 164,700. Since last November, the construction industry has lost an estimated 1,900 jobs. Meanwhile, employment in the manufacturing sector rose by about 200 jobs. While seasonal layoffs were recorded in food processing industries, these layoffs were moderated by recall activity in transportation equipment.

Countering the movement in the goods-producing division, employment in the state's service-producing industries rose over the month. The overall increase, however, was well below the typical monthly gain, reflecting a slower pace of activity in several industry sectors. The gain in employment was clearly dominated by the seasonal increase in part-time openings in retail trade, particularly in general merchandise and apparel stores. Normal hiring patterns were tempered, however, by national trends which reported a decline in retail sales activity during November. Increases in retail trade, coupled with gains in trucking, health services, local government, and educational services, helped to counter seasonal and business-related layoffs in amusements, hotels, agriculture, and business services.

The hours worked by production workers in Maryland's manufacturing industries dropped slightly from 41.2 to 41.1. Although hours were reduced, workers earned slightly higher paychecks in November due to an increase in average hourly earnings from \$11.70 to \$11.79. Within the durable goods component, working an average of 41.9 hours per week yielded a paycheck of \$519.98 in November, up from \$518.67 in October. The shortest workweek in durable goods was reported in transportation equipment. Overtime reductions in this industry caused weekly earnings to drop by \$6.33 to \$617.40 in November. In blast furnaces, on the other hand, a slight increase in overtime, accompanied by a raise in hourly pay rates, resulted in higher weekly paychecks.

In nondurable goods, a slightly reduced workweek failed to impact upon weekly paychecks because of a hike in hourly rates. During November, workers in nondurables earned \$451.76 for a 40.3 hour workweek compared to \$449.25 for 40.4 hours in October. In both the textile mill and paper products industries, shortened workweeks reduced weekly paychecks during November. In the remaining nondurable industries, weekly paychecks rose in response to increased work schedules.

In the Baltimore Metropolitan Area, unlike in the state, the manufacturing workweek was extended by 0.2 of an hour to 41.4 hours in November. On average, workers earned \$12.23 per hour, up from \$12.12. In durable goods, fewer overtime hours were worked whereas, in nondurables, the workweek was lengthened by almost a full hour. Declining overtime lowered wages in durable goods by slightly more than \$1.00 to \$535.25 in November. In nondurables, on the other hand, weekly wages rose from \$460.81 to \$476.01.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
NOVEMBER 1990

Major Industry Group	November 1990	October 1990	November 1989
Total Nonagricultural Employment	2,187.6	2,180.4	2,178.7
Goods Producing	369.3	371.5	376.9
Mining	1.7	1.7	1.7
Construction	164.7	167.1	166.6
Manufacturing	202.9	202.7	208.6
Durable Goods	104.8	104.0	109.6
Nondurable Goods	98.1	98.7	99.0
Service Producing	1,818.3	1,808.9	1,801.8
Transportation & Public Utilities	103.7	102.8	102.8
Trade	549.9	542.4	548.7
Wholesale Trade	114.2	113.9	114.0
Retail Trade	435.7	428.5	434.7
Finance, Insurance, & Real Estate	132.9	132.2	132.0
Services	605.0	605.3	596.6
Total Government	426.8	426.2	421.7
Federal	135.6	136.1	134.3
State	98.9	99.0	98.0
Local	192.3	191.1	189.4

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
NOVEMBER 1990

Major Industry Grouping	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	Nov. 1990	Oct. 1990	Nov. 1990	Oct. 1990	Nov. 1990	Oct. 1990
MARYLAND						
Manufacturing	41.1	41.2	\$484.57	\$482.04	\$11.79	\$11.70
Durable Goods	41.9	42.1	519.98	518.67	12.41	12.32
Lumber and Wood Products	39.9	39.4	361.10	352.63	9.05	8.95
Stone, Clay & Glass Products	43.8	44.0	508.96	503.36	11.62	11.44
Primary Metal Industries	43.6	43.6	686.70	680.60	15.75	15.61
Blast Furnaces	44.0	43.9	696.96	689.23	15.84	15.70
Fabricated Metals	40.3	40.6	421.14	419.80	10.45	10.34
Industrial Machinery	41.3	41.0	506.34	506.76	12.26	12.36
Electronic Equipment	45.8	45.8	432.35	433.73	9.44	9.47
Transportation Equipment	39.2	40.9	617.40	623.73	15.75	15.25
Instruments and Related Products	41.9	42.2	574.03	584.47	13.70	13.85
Miscellaneous Manufacturing Indus.	40.6	40.2	381.64	381.90	9.40	9.50
Nondurable Goods	40.3	40.4	451.76	449.25	11.21	11.12
Food and Kindred Products	41.2	41.1	427.66	417.17	10.38	10.15
Textile Mill, Apparel	35.4	36.2	274.70	280.55	7.76	7.75
Paper and Allied Products	43.0	44.3	516.00	544.89	12.00	12.30
Printing and Publishing	37.7	37.4	497.64	489.94	13.20	13.10
Chemicals and Allied Products	43.5	43.4	562.02	557.69	12.92	12.85
Rubber and Plastic Products	43.2	43.0	425.52	419.25	9.85	9.75
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.4	41.2	\$506.32	\$499.34	\$12.23	\$12.12
Durable Goods	41.3	41.8	535.25	536.29	12.96	12.83
Nondurable Goods	41.5	40.6	476.01	460.81	11.47	11.35

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Labor force patterns in the Baltimore Metropolitan Area were similar to those statewide in that employment declines created a scenario of rising joblessness throughout the region. For the area as a whole, unemployment rose from 4.9 percent to 5.6 percent, a full two percentage points above last November's estimate of 3.6 percent. In Baltimore City, layoffs were commonly reported in construction, finance, and federal government, causing unemployment to escalate from 7.5 percent to 8.2 percent. Meanwhile, in Baltimore and Harford counties, reduced business activity in manufacturing and construction in particular, fueled jobless increases, prompting unemployment rates to rise to 4.9 percent and 5.5 percent, respectively.

MARYLAND D.C. AREA SUBURBS

In Maryland's D.C. suburbs, unemployment advanced to 3.9 percent in November, up from October's rate of 3.6 percent. Even with this increase, unemployment in the suburban area remained the lowest in the state. The largest increase locally occurred in Frederick County where the addition of nearly 900 workers to the unemployment tally pushed the jobless rate up by 1.2 percentage points to 6.0 percent in November. Within the county, a number of temporary layoffs were reported in the manufacturing industry. A slowdown in the county's construction activity was also noted over the month. Elsewhere in the region, Calvert County also experienced a relatively large increase from 4.4 percent to 5.3 percent, making unemployment in the county the second highest in the region.

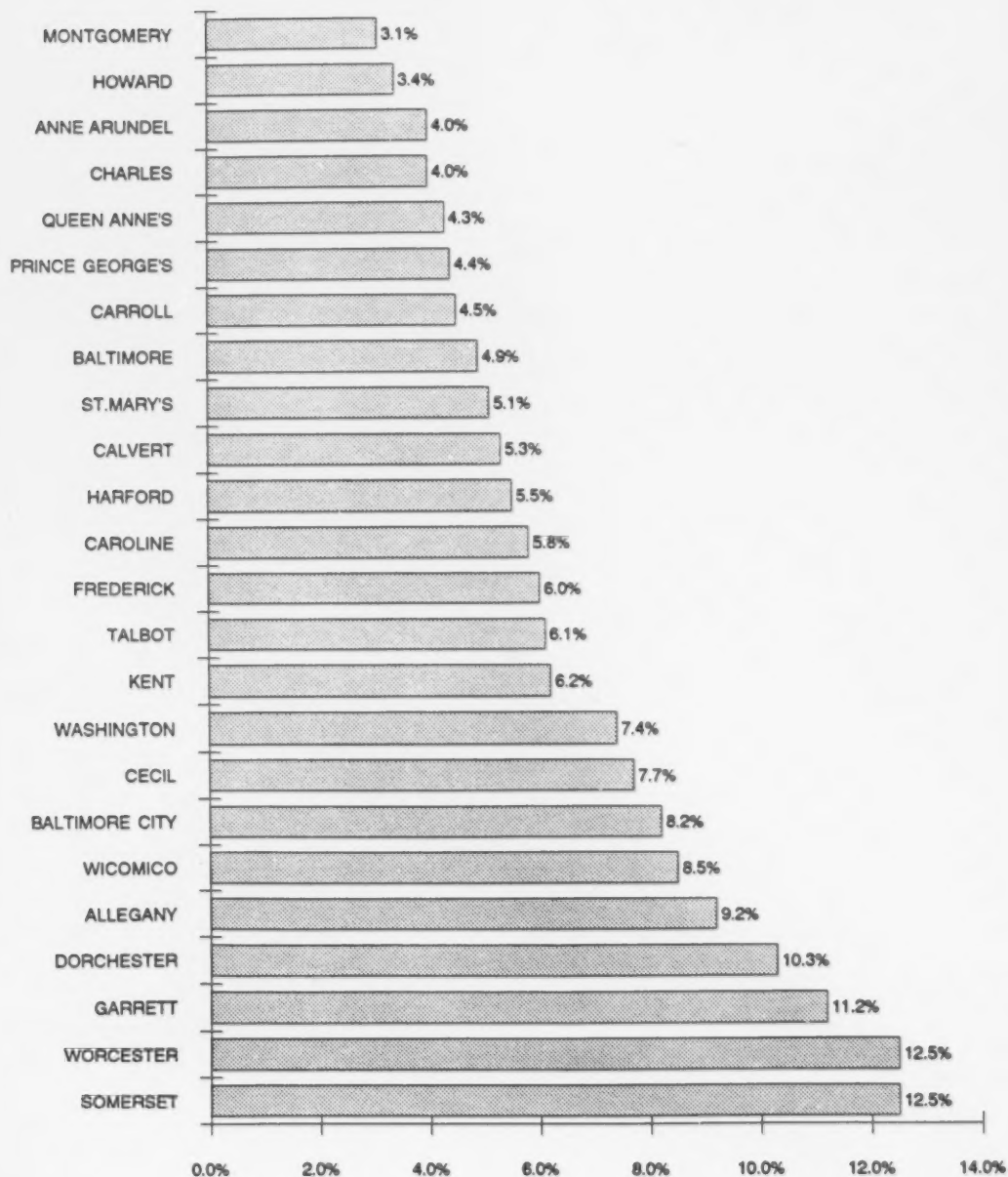
WESTERN MARYLAND

In Western Maryland, the softening in the employment situation resulted in the addition of about 1,500 workers to the jobless count, producing an unemployment rate of 8.4 percent in November. While it is not unusual for the region's jobless rate to rise during November, this is the largest over-the-month increase on record. Regionally, the largest job losses occurred in the construction industry. While unemployment rose in all of the western counties, the large increase, from 7.8 percent to 11.2 percent, was recorded in Garrett County. The employment setback in Garrett was exaggerated by an increase of nearly 175 people in the county's labor force.

BALANCE OF STATE

Joblessness in the Eastern Shore and Southern Maryland region rose to 8.0 percent in November, up from 5.6 percent. Unemployment expanded noticeably in Dorchester, Somerset, and Worcester counties. In Dorchester, cutbacks in manufacturing placed an additional burden on unemployment rolls, causing joblessness to rise to 10.3 percent. Meanwhile, in Somerset, the seasonal downswing in agriculture, seafood, and food processing contributed to increased joblessness and, in Worcester, continued layoffs in tourism-related industries pushed unemployment up to double-digits.

LOCAL UNEMPLOYMENT RATES-NOVEMBER 1990



NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--NOVEMBER 1990

Major Industry Grouping	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	Nov. 1990	Oct. 1990	Nov. 1990	Oct. 1990	Nov. 1990	Oct. 1990	Nov. 1990	Oct. 1990
Total Nonagricultural Employment	1,162.8	1,159.8	790.1	787.8	93.2	93.6	144.0	145.3
Goods Producing	203.5	204.9	106.4	108.7	23.2	23.5	34.8	35.0
Mining	0.3	0.3	0.5	0.5	0.7	0.7	0.2	0.2
Construction	76.8	78.0	68.8	71.1	6.6	7.0	10.3	10.4
Manufacturing	126.4	126.6	37.1	37.1	15.9	15.8	24.3	24.4
Durable Goods	69.9	69.6	18.8	18.7	7.2	7.3	9.3	9.3
Nondurable Goods	56.5	57.0	18.3	18.4	8.7	8.5	15.0	15.1
Service Producing	959.3	954.9	683.7	679.1	70.0	70.1	109.2	110.3
Transportation & Public Utilities	57.7	57.6	33.5	32.9	5.3	5.3	8.0	8.0
Trade	284.1	280.1	203.5	200.2	26.0	25.7	37.1	37.6
Wholesale Trade	67.7	67.7	35.8	35.5	4.5	4.4	6.1	6.1
Retail Trade	216.4	212.4	167.7	164.7	21.5	21.3	31.0	31.5
Finance, Insurance, & Real Estate	76.8	76.5	46.2	45.8	3.3	3.3	5.2	5.2
Services	324.6	324.5	229.0	228.7	20.1	20.4	32.0	32.7
Total Government	216.1	216.2	171.5	171.5	15.3	15.4	26.9	26.8
Federal	54.8	55.4	74.1	74.5	1.9	1.9	6.9	6.9
State	67.3	67.7	21.4	21.4	4.9	4.9	5.8	5.7
Local	94.0	93.1	76.0	75.6	8.5	8.6	14.2	14.2

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

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Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

NOVEMBER 1990

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOV. 1989
MARYLAND	2,497,829	2,529,486	2,366,262	2,415,622	131,567	113,864	5.3	4.5	3.2
BALTIMORE METROPOLITAN AREA	1,196,685	1,210,730	1,129,673	1,151,871	67,012	58,859	5.6	4.9	3.6
BALTIMORE CITY	341,470	345,431	313,394	319,552	28,076	25,879	8.2	7.5	5.8
ANNE ARUNDEL	212,638	215,441	204,064	208,074	8,574	7,367	4.0	3.4	2.3
BALTIMORE	388,089	392,876	368,917	376,167	19,172	16,709	4.9	4.3	3.2
CARROLL	62,709	63,108	59,873	61,049	2,836	2,059	4.5	3.3	1.9
HARFORD	83,015	83,482	78,467	80,009	4,548	3,473	5.5	4.2	3.4
HOWARD	92,976	94,530	89,854	91,620	3,122	2,910	3.4	3.1	1.9
QUEEN ANNE'S	15,788	15,863	15,104	15,401	684	462	4.3	2.9	2.6
D. C. AREA	985,203	999,792	946,297	964,069	38,906	35,723	3.9	3.6	2.3
CALVERT	23,211	23,427	21,973	22,386	1,238	1,041	5.3	4.4	2.6
CHARLES	46,944	47,508	45,082	45,928	1,862	1,580	4.0	3.3	2.1
FREDERICK	77,439	77,920	72,827	74,195	4,612	3,725	6.0	4.8	2.0
MONTGOMERY	421,577	428,430	408,564	416,237	13,013	12,193	3.1	2.8	1.9
PRINCE GEORGE'S	416,033	422,508	397,852	405,324	18,181	17,184	4.4	4.1	2.7
WESTERN MARYLAND	104,994	106,149	96,174	98,796	8,820	7,353	8.4	6.9	5.5
ALLEGANY	32,506	32,772	29,528	30,302	2,978	2,470	9.2	7.5	6.6
GARRETT	12,879	12,708	11,432	11,719	1,447	989	11.2	7.8	8.0
WASHINGTON	59,609	60,669	55,214	56,775	4,395	3,894	7.4	6.4	4.3
BALANCE OF STATE	210,947	212,816	194,118	200,885	16,829	11,931	8.0	5.6	4.6
CAROLINE	13,961	14,242	13,157	13,605	804	637	5.8	4.5	2.6
CECIL	35,313	35,828	32,578	33,673	2,735	2,155	7.7	6.0	5.1
DORCHESTER	18,340	18,177	16,458	17,069	1,882	1,108	10.3	6.1	5.5
KENT	9,440	9,698	8,855	9,198	585	500	6.2	5.2	3.4
ST. MARY'S	41,555	42,112	39,435	40,153	2,120	1,959	5.1	4.7	3.3
SOMERSET	13,010	12,917	11,390	11,902	1,620	1,015	12.5	7.9	7.9
TALBOT	17,951	18,132	16,863	17,227	1,088	905	6.1	5.0	3.1
WICOMICO	41,511	40,837	37,991	38,723	3,520	2,114	8.5	5.2	4.1
WORCESTER	19,866	20,873	17,391	19,335	2,475	1,538	12.5	7.4	8.2
UNITED STATES ¹	124,821,000	125,020,000	117,611,000	118,299,000	7,211,000	6,722,000	5.8	5.4	5.2

*Estimates for the state are revised.

¹ Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

 Maryland
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OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION

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Maryland
Department of Economic &
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LABOR MARKET DIMENSIONS

**A Monthly Report on the Dynamics of
the Labor Market in Maryland**

December, 1990

**Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201**

**William Donald Schaefer, Governor
J. Randall Evans, Secretary**

LABOR MARKET DIMENSIONS
DECEMBER, 1990

MARYLAND

Maryland continued to experience rising unemployment during December, providing further evidence that the statewide job market is contracting amidst the national economic slowdown. Against this backdrop, employment declined during December, causing the statewide jobless rate to move forward from 5.3 percent in November to 6.0 percent in December.

With this increase, unemployment in Maryland rose above the national estimate for the first time in nearly a decade. Nationally, December's unemployment estimate rose to 5.9 percent, up from November's rate of 5.8 percent.

While the incidence of cyclical unemployment tends to increase in many industries during the winter months, these cutbacks are normally moderated by seasonal hiring during December. From an historical perspective, these movements help to make December's unemployment rate one of the lowest during the year. This year, however, over the month developments not only inhibited hiring activity but, also, caused some businesses to scale back due to slower demand. As a result, employment dropped back by 30,256 to 2,335,981 in December, resulting in a 16,285 increase in joblessness across the state. December's unemployment level of 148,161 is the highest count of unemployed persons seen since mid 1983.

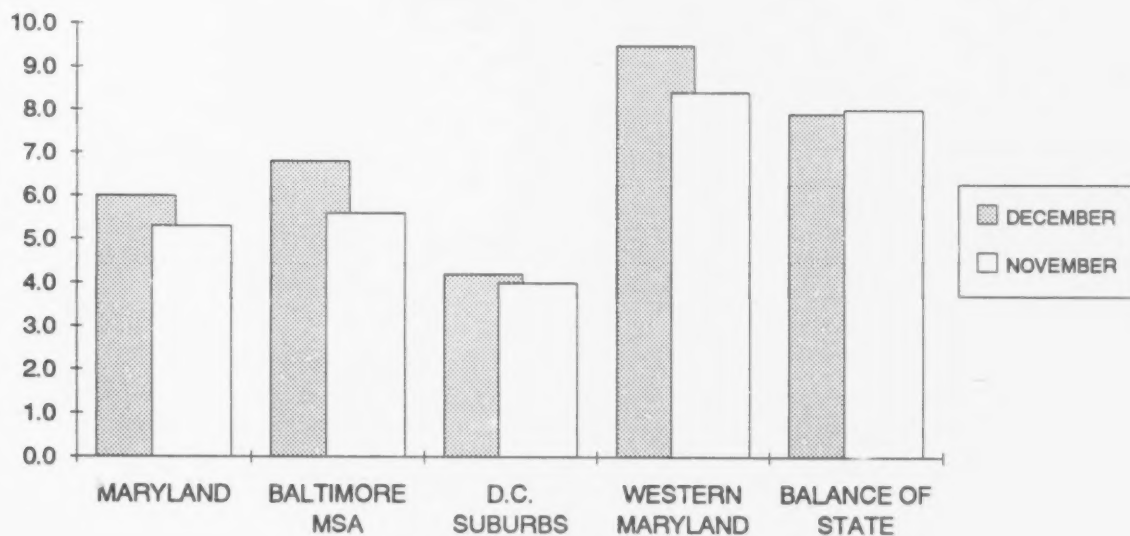
	December 1990	November 1990	December 1989
Civilian Labor Force	2,484,142	2,498,113	2,524,173
Total Employment	2,335,981	2,366,237	2,443,563
Total Unemployment	148,161	131,876	80,610
Unemployment Rate	6.0	5.3	3.2
National Civilian Unemployment Rate	5.9	5.8	5.1

The upturn in unemployment over the past few months will undoubtedly affect the final determination of labor market indicators for the year 1990. Based on preliminary estimates, unemployment for 1990 will hover around 4.2 percent, up from 1989's average of 3.7 percent.

TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

Region	December 1990		November 1990	
	Number	Rate	Number	Rate
Maryland	148,161	6.0	131,876	5.3
Baltimore Metropolitan Area	80,717	6.8	66,886	5.6
Maryland's D.C. Suburbs	41,038	4.2	39,228	4.0
Western Maryland	10,028	9.5	8,869	8.4
Balance of State	16,378	7.9	16,894	8.0

UNEMPLOYMENT RATES-DECEMBER 1990



INDUSTRY DEVELOPMENTS

The softening in the economy was particularly evident in the performance of Maryland's industrial payrolls during December. The number of jobs provided by employers in the state dropped back by an estimated 11,900 to 2,175,600 during December, with declines occurring in almost every major industry line. For the first time this year, the current job count is below year ago levels. Last December, the job count included about 2,400 more jobs, for a total of 2,178,000.

Job losses during December were particularly heavy in the goods-producing industries. The most notable weakness occurred in construction where job losses, while not unexpected, have been much deeper than the norm over the past few months. During December, construction employment was cutback by about 7,300 jobs, a decline which touched both indoor and outdoor activity. Nearly two-thirds of the overall drop in construction, however, occurred among special trade contractors. In manufacturing, slower demand lowered employment needs in a number of industries such as paper products, industrial machinery, instruments and stone products. These declines were in addition to normal seasonal layoffs in food processing and an unexpected reduction in the auto industry. In all, manufacturing payrolls dwindled by 4,400 jobs. Manufacturing employment, at 197,900 in December, is at its lowest level on record going back to 1980.

While overall employment in manufacturing declined over the month, there was a slight increase, from 41.1 to 41.2, in the number of hours worked each week by production workers. This increase, however, failed to raise weekly paychecks since hourly earnings declined by \$.14 over the month to \$11.66 in December. The durable goods workweek rose by 0.7 of an hour, with a lengthening of workweeks reported in all durable goods industries with the exception of primary metals and stone, clay and glass products. Of those industries reporting longer workweeks, transportation equipment was the only industry where earnings declined. A drop in hourly earnings, of \$1.14, reduced weekly paychecks in this industry from \$628.06 in November to \$610.88 in December. On the nondurables side, the average workweek fell below 40 hours to 39.8 in December. This reduction in hours resulted in a lowering of weekly paychecks from \$450.24 to \$444.17. Paychecks dwindled in each of the nondurable industries with the exception of textile mill products where a lengthening in the workweek yielded a paycheck of \$274.76, up from \$271.58 in November.

On the service-producing side of the economy, employment also declined during December, however, losses were limited to just 200 jobs. In hotels, amusements, agricultural services and business services, seasonal layoffs lowered employment totals. The employment needs in local restaurants also declined during December as consumers began to pull back on discretionary spending. Meanwhile, the beginning of semester breaks caused temporary cutbacks at colleges and universities, in educational services and in state and local education. Countering these movements, hiring activity was reported in general merchandise and apparel stores, food stores, health services, trucking and local government.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
DECEMBER 1990

Major Industry Group	December 1990	November 1990	December 1989
Total Nonagricultural Employment	2,175.6	2,187.5	2,178.0
Goods Producing	357.0	368.7	369.1
Mining	1.7	1.7	1.7
Construction	157.4	164.7	158.6
Manufacturing	197.9	202.3	208.8
Durable Goods	100.2	104.2	109.9
Nondurable Goods	97.7	98.1	98.9
Service Producing	1,818.6	1,818.8	1,808.9
Transportation & Public Utilities	104.4	104.2	103.3
Trade	553.0	549.8	558.4
Wholesale Trade	113.8	114.0	113.4
Retail Trade	439.2	435.8	445.0
Finance, Insurance, & Real Estate	132.8	132.8	132.2
Services	601.6	604.9	594.9
Total Government	426.8	427.1	420.1
Federal	135.2	135.6	134.7
State	98.6	98.9	97.2
Local	193.0	192.6	188.2

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
DECEMBER 1990

Major Industry Grouping	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	Dec. 1990	Nov. 1990	Dec. 1990	Nov. 1990	Dec. 1990	Nov. 1990
MARYLAND						
Manufacturing	41.2	41.1	\$480.39	\$484.98	\$11.66	\$11.80
Durable Goods	42.8	42.1	522.59	523.72	12.21	12.44
Lumber and Wood Products	39.7	39.5	365.64	355.50	9.21	9.00
Stone, Clay & Glass Products	44.2	44.5	499.46	505.08	11.30	11.35
Primary Metal Industries	43.1	43.6	680.55	687.14	15.79	15.76
Blast Furnaces	43.5	44.0	693.83	697.40	15.95	15.85
Fabricated Metals	41.5	41.0	443.64	433.78	10.69	10.58
Industrial Machinery	42.5	41.6	530.40	512.93	12.48	12.33
Electronic Equipment	46.6	45.7	441.30	431.41	9.47	9.44
Transportation Equipment	41.5	39.6	610.88	628.06	14.72	15.86
Instruments and Related Products	42.6	42.3	590.01	587.97	13.85	13.90
Miscellaneous Manufacturing Indus.	41.0	40.5	397.70	386.78	9.70	9.55
Nondurable Goods	39.8	40.2	444.17	450.24	11.16	11.20
Food and Kindred Products	40.1	40.8	417.84	427.18	10.42	10.47
Textile Mill, Apparel	36.2	35.5	274.76	271.58	7.59	7.65
Paper and Allied Products	43.0	42.7	498.80	506.00	11.60	11.85
Printing and Publishing	37.0	37.8	493.95	498.96	13.35	13.20
Chemicals and Allied Products	43.0	43.3	552.55	559.00	12.85	12.91
Rubber and Plastic Products	43.0	43.5	425.70	427.61	9.90	9.83
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.4	41.5	\$501.77	\$509.21	\$12.12	\$12.27
Durable Goods	42.2	41.6	536.36	542.05	12.71	13.03
Nondurable Goods	40.6	41.3	467.71	473.71	11.52	11.47

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

In the Baltimore Metropolitan Area, declining employment caused joblessness in the region to rise from 5.6 percent to 6.8 percent. The Baltimore Metro Area assumed a disproportionate share of the statewide unemployment increase during December. About eight out of every ten workers who joined the state's unemployment rolls resided in the BMA. Unemployment advanced throughout the region, with jobless rates ranging from a low of 4.0 percent in Howard County to a high of 9.8 percent in Baltimore City. Layoffs in the auto industry impacted noticeably upon activity within the jurisdictions. These layoffs, combined with a number of holiday shutdowns, were responsible for reducing the region's manufacturing payrolls by an estimated 3,400 jobs during December.

MARYLAND D.C. AREA SUBURBS

In Maryland's D.C. suburbs, unemployment also rose, by 0.2 percentage points, to 4.2 percent in December. Unemployment in the suburban area, while significantly below that of the state's other regions, has not been this high since early 1984. Locally, monthly changes were relatively minor with the exception of those in Calvert and Frederick counties. In Calvert, where the unemployment rate shot up from 5.2 percent to 6.0 percent, a relatively sizeable layoff was initiated by a supermarket chain. Frederick County's increase, from 5.9 percent to 6.6 percent, was fueled by continuing job losses in manufacturing and construction and by layoffs in local government.

WESTERN MARYLAND

Labor force patterns in Western Maryland were relatively consistent with those statewide. The unemployment impact in the Western region, however, was exaggerated even further by the fact that very few residents chose to leave the labor force upon becoming unemployed. As a result, more than three-fourths of the regional employment decline was reflected on the unemployment rolls. During December, an estimated 9.5 percent of the labor force, or slightly more than 10,000 persons, were counted among the unemployed, up from 8.4 percent, or 8,869 persons, in November. Washington County residents were the most sorely affected by rising joblessness. Unemployment in the county rose from 7.4 percent to 8.8 percent, with layoffs scattered throughout the construction and manufacturing industries.

BALANCE OF STATE

In the Southern Maryland and Eastern Shore areas, where local unemployment trends were mixed, the net result was a slight drop in the regional jobless rate from 8.0 percent to 7.9 percent. In those counties where unemployment rates subsided, labor force declines helped to stave off rising joblessness. Seasonal factors were at work throughout the region, with end of season layoffs in food processing, agribusiness and eating and drinking establishments. In addition, a number of holiday shutdowns, particularly in manufacturing, were reported. Locally, unemployment rates ranged from a low of 5.4 percent in St. Mary's to a high of 15.3 percent in Worcester. Of note is the fact that Talbot County, while demonstrating a monthly increase in unemployment, was the only county in the state to experience an over the year drop in joblessness.

LOCAL UNEMPLOYMENT RATES-DECEMBER 1990



NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--DECEMBER 1990

Major Industry Grouping	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION - D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	Dec.1990	Nov.1990	Dec.1990	Nov.1990	Dec.1990	Nov.1990	Dec.1990	Nov.1990
Total Nonagricultural Employment	1,156.6	1,159.9	789.5	790.0	93.5	93.9	142.7	143.9
Goods Producing	196.7	202.6	105.7	106.9	22.9	23.5	34.2	34.8
Mining	0.3	0.3	0.5	0.5	0.7	0.7	0.2	0.2
Construction	73.9	76.4	68.5	69.7	6.4	6.8	10.0	10.3
Manufacturing	122.5	125.9	37.2	37.2	15.8	16.0	24.0	24.3
Durable Goods	66.2	69.5	18.8	18.8	7.3	7.3	9.3	9.3
Nondurable Goods	56.3	56.4	18.4	18.4	8.5	8.7	14.7	15.0
Service Producing	959.9	957.3	683.8	683.1	70.6	70.4	108.5	109.1
Transportation & Public Utilities	57.6	57.6	33.3	33.3	5.2	5.2	8.0	8.0
Trade	285.5	282.5	205.6	203.1	26.3	26.1	36.4	36.9
Wholesale Trade	67.7	67.7	36.2	35.8	4.4	4.4	6.0	6.1
Retail Trade	217.8	214.8	169.4	167.3	21.9	21.7	30.4	30.8
Finance, Insurance, & Real Estate	76.5	76.6	46.1	46.2	3.3	3.3	5.1	5.2
Services	323.8	324.2	227.3	228.9	20.4	20.3	32.0	32.0
Total Government	216.5	216.4	171.5	171.6	15.4	15.5	27.0	27.0
Federal	54.5	54.8	74.3	74.2	1.8	1.9	6.9	6.9
State	67.3	67.4	21.1	21.3	4.9	4.9	5.8	5.8
Local	94.7	94.2	76.1	76.1	8.7	8.7	14.3	14.3

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

DECEMBER 1990

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	DECEMBER	NOVEMBER*	DECEMBER	NOVEMBER*	DECEMBER	NOVEMBER*	DECEMBER	NOVEMBER*	DEC. 1989
MARYLAND	2,484,142	2,498,113	2,335,981	2,366,237	148,161	131,876	6.0	5.3	3.2
BALTIMORE METROPOLITAN AREA	1,192,056	1,194,736	1,111,339	1,127,850	80,717	66,886	6.8	5.6	3.3
BALTIMORE CITY	341,976	340,872	308,308	312,888	33,668	27,984	9.8	8.2	5.4
ANNE ARUNDEL	211,126	212,347	200,752	203,735	10,374	8,612	4.9	4.1	2.2
BALTIMORE	385,826	387,391	362,930	368,322	22,896	19,069	5.9	4.9	2.9
CARROLL	62,536	62,623	58,901	59,776	3,635	2,847	5.8	4.5	2.0
HARFORD	82,704	82,868	77,194	78,340	5,510	4,528	6.7	5.5	3.2
HOWARD	92,127	92,872	88,396	89,709	3,731	3,163	4.0	3.4	1.7
QUEEN ANNE'S	15,762	15,762	14,859	15,079	903	683	5.7	4.3	2.3
D. C. AREA	979,144	986,487	938,106	947,259	41,038	39,228	4.2	4.0	2.3
CALVERT	23,180	23,208	21,783	21,995	1,397	1,213	6.0	5.2	2.9
CHARLES	46,709	47,010	44,691	45,127	2,018	1,883	4.3	4.0	2.1
FREDERICK	77,303	77,443	72,197	72,901	5,106	4,542	6.6	5.9	2.6
MONTGOMERY	418,712	422,184	405,027	408,979	13,685	13,205	3.3	3.1	1.9
PRINCE GEORGE'S	413,239	416,640	394,408	398,256	18,831	18,384	4.6	4.4	2.7
WESTERN MARYLAND	105,461	105,771	95,433	96,902	10,028	8,869	9.5	8.4	5.5
ALLEGANY	32,574	32,700	29,324	29,706	3,250	2,994	10.0	9.2	5.5
GARRETT	12,821	12,977	11,357	11,525	1,464	1,452	11.4	11.2	6.0
WASHINGTON	60,066	60,094	54,752	55,671	5,314	4,423	8.8	7.4	5.3
BALANCE OF STATE	207,479	211,119	191,101	194,225	16,378	16,894	7.9	8.0	5.4
CAROLINE	13,940	13,970	13,117	13,159	823	811	5.9	5.8	3.6
CECIL	34,934	35,466	32,343	32,647	2,591	2,819	7.4	7.9	5.4
DORCHESTER	17,410	18,332	15,913	16,462	1,497	1,870	8.6	10.2	4.8
KENT	8,968	9,447	8,450	8,855	518	592	5.8	6.3	5.3
ST. MARY'S	41,400	41,552	39,168	39,443	2,232	2,109	5.4	5.1	4.1
SOMERSET	12,763	13,021	11,019	11,402	1,744	1,619	13.7	12.4	6.2
TALBOT	17,898	17,941	16,768	16,864	1,130	1,077	6.3	6.0	6.9
WICOMICO	40,698	41,506	37,828	37,999	2,870	3,507	7.1	8.4	5.7
WORCESTER	19,468	19,884	16,495	17,394	2,973	2,490	15.3	12.5	8.2
1									
UNITED STATES	124,630,000	124,821,000	117,287,000	117,611,000	7,343,000	7,211,000	5.9	5.8	5.1

*Estimates for the state are revised.

1

Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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LABOR MARKET DIMENSIONS

JANUARY, 1991

Maryland Department of Economic and Employment Development

Office of Labor Market Analysis and Information

1100 North Eutaw Street

Baltimore, Maryland 21201

William Donald Schaefer, Governor

J. Randall Evans, Secretary

LABOR FORCE DEVELOPMENTS

After months of rising unemployment, Maryland's jobless rate leveled off in January, holding steady at 6.1 percent. While the current unemployment rate indicates tighter economic conditions when compared to last January's rate of 4.3 percent, Maryland's unemployment rate was nearly a full percentage point below the national estimate which climbed from 5.9 percent in December to 7.0 percent in January.

The stability of January's jobless rate was good news considering the upturn in 1990 which, in December, elevated Maryland's rate above the national estimate for the first time in nearly ten years. Although January's rate is the highest reading since 1984, it contrasts sharply with movements in prior recessionary years when monthly increases raised unemployment to 7.0 percent in January 1975 and 8.7 percent in January 1982.

	January 1991	December 1990	January 1990
Civilian Labor Force	2,476,241	2,489,018	2,510,921
Total Employment	2,324,150	2,338,230	2,402,724
Total Unemployment	152,091	150,788	108,197
Unemployment Rate	6.1	6.1	4.3
National Unemployment Rate	7.0	5.9	5.9

Sizeable employment reductions, often accompanied by rising levels of unemployment, are typical for January. This year's labor market movements, while following normal patterns, resulted in relatively small changes. The magnitude of these changes was, perhaps, tempered by the unusually large ups and downs during the last six months of 1990. During January, the number of workers in the state declined by 14,080 to 2,324,150. The impact of this decline on the unemployment rolls was, however, negligible because a large number of workers chose to leave the labor force. The withdrawal of an estimated 12,777 workers from the job market helped to hold down the normal January jobless increase to just 1,303 persons. Even so, January's unemployment level of 152,091 is the highest since July 1983 when about 154,611 persons were listed on the statewide unemployment rolls.

The slowdown in Maryland's economy has visibly affected labor force developments over the past year. Fewer people have jobs, the unemployment count has expanded and the number of people actually participating in the job market has declined. This labor force decline, while possibly an indication of worker discouragement, has been a major factor in helping to moderate the effects of recent job losses on the unemployment rate.

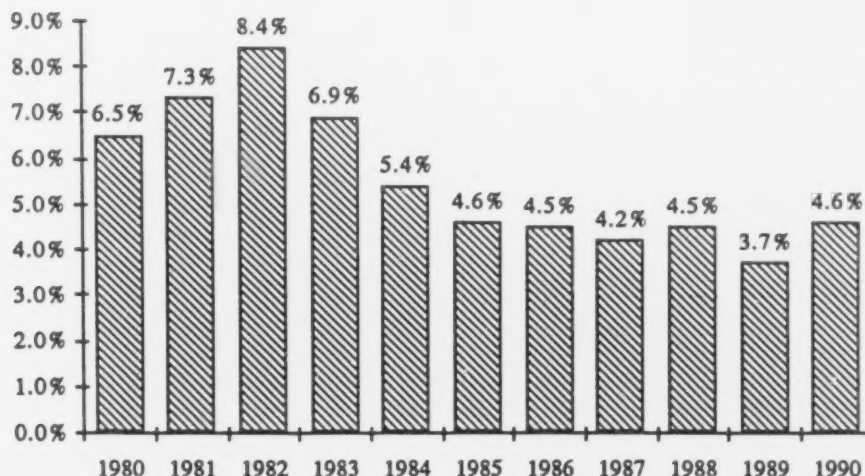
1990 REVIEW

The last half of 1990 signaled a time of economic uncertainty in Maryland. After months of dogged resistance to national economic trends, the movement in Maryland's labor force statistics during the third quarter of 1990 provided a clear indication that statewide economics were falling in line with those nationally. By the third quarter, statewide employment growth had virtually come to a standstill. The labor force, however, continued to rise—a movement which added more than 28,000 workers to the unemployment rolls and pushed joblessness up to 5.0 percent. Labor market conditions deteriorated even further during the last three months of the year. Normal seasonal increases were debilitated by a flood of unexpected layoffs, both temporary and permanent. With employment declines in excess of 79,000 and joblessness rising to 5.6 percent during the fourth quarter, the word "recession" began to creep into Maryland's economic vocabulary.

	First Quarter	Second Quarter	Third Quarter	Fourth Quarter
Civilian Labor Force	2,524,633	2,541,663	2,570,382	2,503,322
Employment	2,422,655	2,441,329	2,441,665	2,362,351
Unemployment	101,978	100,334	128,717	140,971
Unemployment Rate	4.0	4.0	5.0	5.6

Beleaguered by these developments, Maryland's job market statistics for 1990 showed a net decline of 13,000 in employment and, on the unemployment side of the ledger, a net increase of 25,000. On an annual basis, unemployment among Marylanders rose from 3.7 percent in 1989 to 4.6 percent in 1990. With the exception of a moderate increase in 1988, Maryland's jobless rate had consistently declined since peaking at 8.4 percent during the recession of 1982.

MARYLAND UNEMPLOYMENT RATES - 1980-1990



INDUSTRY DEVELOPMENTS

Maryland's economy, which began to falter under the weight of recessionary pressures during the latter part of 1990, was diminished even further during January by seasonal employment declines. Employers rolled back their payrolls by an estimated 68,800 jobs during January, with cutbacks reducing employment levels in every major industry line.

The manufacturing industry, which experienced an unexpected drop in employment during December, appeared unscathed during January since employment dropped back by a mere 300 jobs. While seasonal movements and reduced business activity did impact upon payrolls at the detailed industry level, the overall effect on manufacturing was minimized by recall activity in transportation equipment which restored approximately 2,300 jobs during January. This increase succeeded in offsetting seasonal losses in food processing and textile manufacturing and in downplaying economically-induced layoffs in lumber, stone products, primary metals and chemical products.

With production orders declining, many of Maryland's manufacturers cutback on activities by shortening workweeks. During January, the number of overtime hours worked in manufacturing was reduced by 1.2 hours, lowering the average workweek to 40.2. Reductions in overtime caused weekly paychecks to drop by more than \$8.00 to \$471.95. Trends were similar in both durable and nondurable industries, however, declines were much more pronounced in the durable goods component. In durables, working an average of 41.6 hours yielded a weekly paycheck of \$513.76 in January, down from December's estimate of \$526.96 for a 43.3 hour workweek. Shortened workweeks were reported by all durable goods producers. With the exception of the transportation equipment industry, fewer work hours resulted in smaller paychecks during January. In nondurables, the workweek dropped by 0.8 of an hour to 39.0 hours and weekly earnings fell by just under \$6.00 to \$434.46. In paper products, the only nondurable goods industry to report a lengthening in the workweek, weekly paychecks rose substantially from \$503.65 to \$530.20.

Construction, an industry which has steadily declined since August 1990, sustained additional losses during January. All told, employment in the construction trades has dropped by slightly more than 18,000 jobs since August. Nearly half of this decline occurred in January. The current downturn in construction lowered employment to 145,500, reflecting an over-the-year loss of 4,600 jobs. While some of the recent cutbacks in construction, particularly those among heavy contractors, can be tied to seasonal economics, recessionary factors have definitely hampered performance in this industry line. As has been the pattern for several months, special trade contractors posted the largest decline during January, with job losses numbering about 4,000.

Jobs in transportation, communications, and utilities dropped back by 3,700 to a level of 99,900 in January. Compared to last January, however, employment in this industry group was up by an estimated 600 jobs. Job declines, for the most part, were confined to the transportation sector. While employment declines were noted in water transportation, cutbacks in trucking and warehousing were largely responsible for the downward movement in the industry's payrolls.

The number of jobs in the trade sector contracted by 26,900 between December and January. Losses in trade extended well beyond the pre-holiday buildup, an indication that the recession has softened the employment situation in this industry. While slightly more than one-third of the employment drop off in this industry resulted from post-holiday layoffs in general merchandise and apparel stores, reductions were reported in a number of other trade industries. Within the retail component, cutbacks were noted in eating and drinking places, food stores, building material stores and among auto dealers and furniture retailers.

In finance, insurance, and real estate, seasonal layoffs, partnered with declining economics, prompted losses of about 1,000 jobs during January. Losses were restricted primarily to the finance sector, with layoffs centered in depository institutions, and to the real estate component. Employment in the insurance industry, on the other hand, rose by 100 jobs over the month.

Losses in a number of individual services industries pulled down employment in this sector by slightly more than 15,000 jobs between December and January. Semester breaks at private colleges and universities caused employment in educational services to drop back by an estimated 3,100 jobs. A like decline was noted in business services, with computer and data processing firms showing the largest losses. Elsewhere in services, job reductions, of note, also occurred in hotels, amusements and agricultural services.

Employment trends in the public sector during January, were, for the most part, dominated by semester break activity at educational facilities. State government lost 3,400 jobs, 98 percent of which were tied to temporary layoffs in education. Losses were deeper in local government where layoffs by boards of education, community colleges and local government agencies reduced employment by some 7,900 jobs over the month.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JANUARY 1991

Industry	January 1991	December 1990	January 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,123.2	2,192.0	2,116.4
Goods Producing	349.8	359.1	356.4
Mining	1.9	2.0	1.9
Construction	145.5	154.4	150.1
Heavy Construction	15.0	18.2	15.3
Manufacturing	202.4	202.7	204.4
Durable Goods	106.3	104.9	107.9
Lumber & Wood Products	3.9	4.1	3.9
Stone, Clay, & Glass Products	8.0	8.3	8.3
Concrete, Gypsum, Plaster	5.0	5.3	5.2
Other Stone, Clay, & Glass	3.0	3.0	3.1
Primary Metal Industries	10.8	11.0	10.7
Blast Furnaces	9.0	9.2	9.0
Fabricated Metal Products	9.9	10.0	9.8
Fabricated Structural Metal Products	4.1	4.2	4.2
Other Fabricated Metal Products	4.7	4.7	4.6
Industrial Machinery	15.7	15.7	17.1
Refrigeration & Service Mach.	1.9	1.9	2.5
Other Industrial Machinery & Equipment	9.5	9.5	10.0
Electronic Equipment	15.2	15.2	16.9
Communications Equipment	4.5	4.5	4.5
Electronic Component	3.7	3.7	4.6
Other Electronic Equipment	7.0	7.0	7.8
Transportation Equipment	13.3	11.0	11.3
Motor Vehicles	5.4	3.1	2.5
Other Transportation	3.2	3.3	3.4
Instruments & Related	24.0	24.0	24.4
Miscellaneous Manufacturing	2.7	2.7	2.7
Nondurable Goods	96.1	97.8	96.5
Food & Kindred Products	24.1	25.0	24.1
Meat Products	5.9	6.0	5.8
Beverages	4.1	4.4	4.1
Other Food & Kindred	9.5	9.8	9.7
Textile Mill, Apparel	9.9	10.2	9.9
Paper & Allied Products	9.6	9.7	9.3
Printing & Publishing	28.3	28.4	28.8
Chemicals and Allied Products	13.7	13.9	13.8
Rubber & Miscellaneous	8.4	8.5	8.4
Other Nondurable Goods	2.1	2.1	2.2

Industry	January 1991	December 1990	January 1990
Service Producing	1,773.4	1,832.9	1,760.0
Transportation & Public Utilities	99.9	103.6	99.3
Transportation	55.7	59.3	55.3
Railroad Transportation	4.4	4.5	4.6
Trucking & Warehousing	28.4	31.1	27.9
Communications & Utilities	44.2	44.3	44.0
Communications	27.9	27.9	27.9
Electric, Gas, Sanitary	16.3	16.4	16.1
Trade	518.3	545.2	521.5
Wholesale Trade	108.4	110.1	108.4
Retail Trade	409.9	435.1	413.1
Building Materials, Garden Supplies	16.1	17.4	16.4
General Merchandise	46.8	53.7	47.4
Food Stores	66.6	68.9	65.4
Eating & Drinking Places	124.5	130.5	125.9
Finance, Insurance, & Real Estate	130.7	131.7	129.8
Finance	58.1	58.7	58.6
Depository Institutions	42.6	43.1	42.9
Commercial Banks	27.4	27.8	27.7
Insurance	38.8	38.7	37.7
Insurance Carriers	25.8	25.6	24.9
Real Estate	33.8	34.3	33.5
Services	610.6	625.7	598.0
Business Services	132.3	135.4	131.6
Health Services	161.4	162.0	153.9
Hospitals	79.6	79.6	75.4
Legal Services	15.9	16.1	15.7
Educational Services	33.7	36.8	33.1
Private Colleges, Universities	16.3	19.4	15.8
Total Government	413.9	426.7	411.4
Total Federal Government	131.9	133.4	133.1
Department of Defense	46.3	47.7	47.1
Other Federal Government	85.6	85.7	86.0
Total State & Local Government	282.0	293.3	278.3
Total State Government	96.0	99.4	95.3
State Education	29.5	32.8	29.4
Other State Government	66.5	66.6	65.9
Total Local Government	186.0	193.9	183.0
Local Education	110.8	117.3	109.4
Other Local Government	75.2	76.6	73.6

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES

JANUARY 1991

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	January 1991	December 1990	January 1991	December 1990	January 1991	December 1990
MARYLAND						
Manufacturing	40.2	41.4	\$471.95	\$480.24	\$11.74	\$11.60
Durable Goods	41.6	43.3	513.76	526.96	12.35	12.17
Lumber and Wood Products	38.8	39.9	345.32	363.09	8.90	9.10
Stone, Clay, and Glass Products	40.3	44.8	459.42	502.21	11.40	11.21
Primary Metal Industries	42.6	43.2	671.38	675.22	15.76	15.63
Blast Furnaces	43.3	43.6	686.31	688.44	15.85	15.79
Fabricated Metals	42.1	43.3	450.47	465.48	10.70	10.75
Industrial Machinery	40.5	43.2	506.25	543.46	12.50	12.58
Electronic Equipment	45.3	46.0	422.20	432.86	9.32	9.41
Transportation Equipment	39.5	41.0	613.04	599.83	15.52	14.63
Instruments and Related Products	43.1	44.7	581.85	628.04	13.50	14.05
Miscellaneous Manufacturing Industries	40.5	41.7	382.73	408.66	9.45	9.80
Nondurable Goods	39.0	39.8	434.46	440.19	11.14	11.06
Food and Kindred Products	39.4	40.5	399.52	413.10	10.14	10.20
Textile Mill, Apparel	34.0	36.5	255.00	277.40	7.50	7.60
Paper and Allied Products	44.0	42.9	530.20	503.65	12.05	11.74
Printing and Publishing	36.0	36.5	482.40	483.63	13.40	13.25
Chemicals and Allied Products	42.0	42.6	531.30	532.50	12.65	12.50
Rubber and Plastic Products	43.0	43.8	425.70	437.56	9.90	9.99
BALTIMORE METROPOLITAN AREA						
Manufacturing	40.5	41.9	\$494.10	\$504.06	\$12.20	\$12.03
Durable Goods	41.1	42.8	533.48	542.70	12.98	12.68
Nondurable Goods	39.8	41.0	450.93	466.17	11.33	11.37

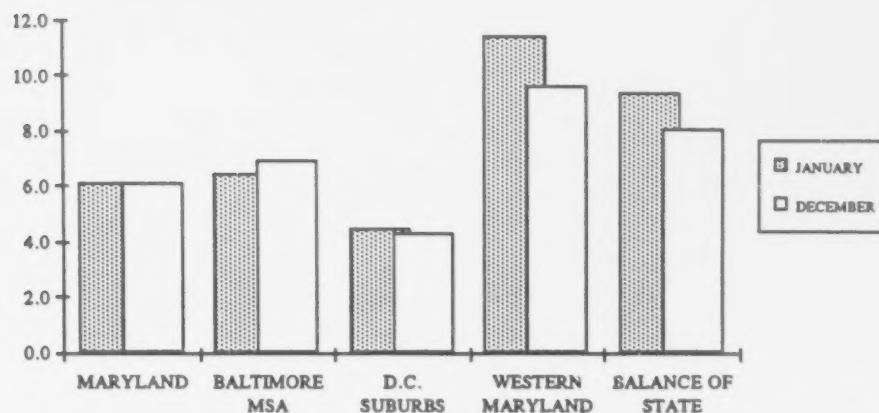
BALANCE OF STATE

Joblessness on the Eastern Shore and in Southern Maryland left 9.4 percent of the labor force, or an estimated 19,332 persons, without a job in January, up from 8.1 percent in December. Seasonal fluctuations, exaggerated by the current economic slowdown, were apparent throughout the region where unemployment rates in January ranged from a low of 5.9 percent in St. Mary's County to a high of 17.2 percent in Worcester County. Aside from Worcester, double digit jobless rates were reported in Cecil, Dorchester and Somerset. In Cecil, furloughs in Delaware's auto industry clouded the county's economic picture. In the remaining shore counties, unemployment increases were primarily seasonal, with declines in agribusiness and related food processing businesses causing local labor market conditions to slide.

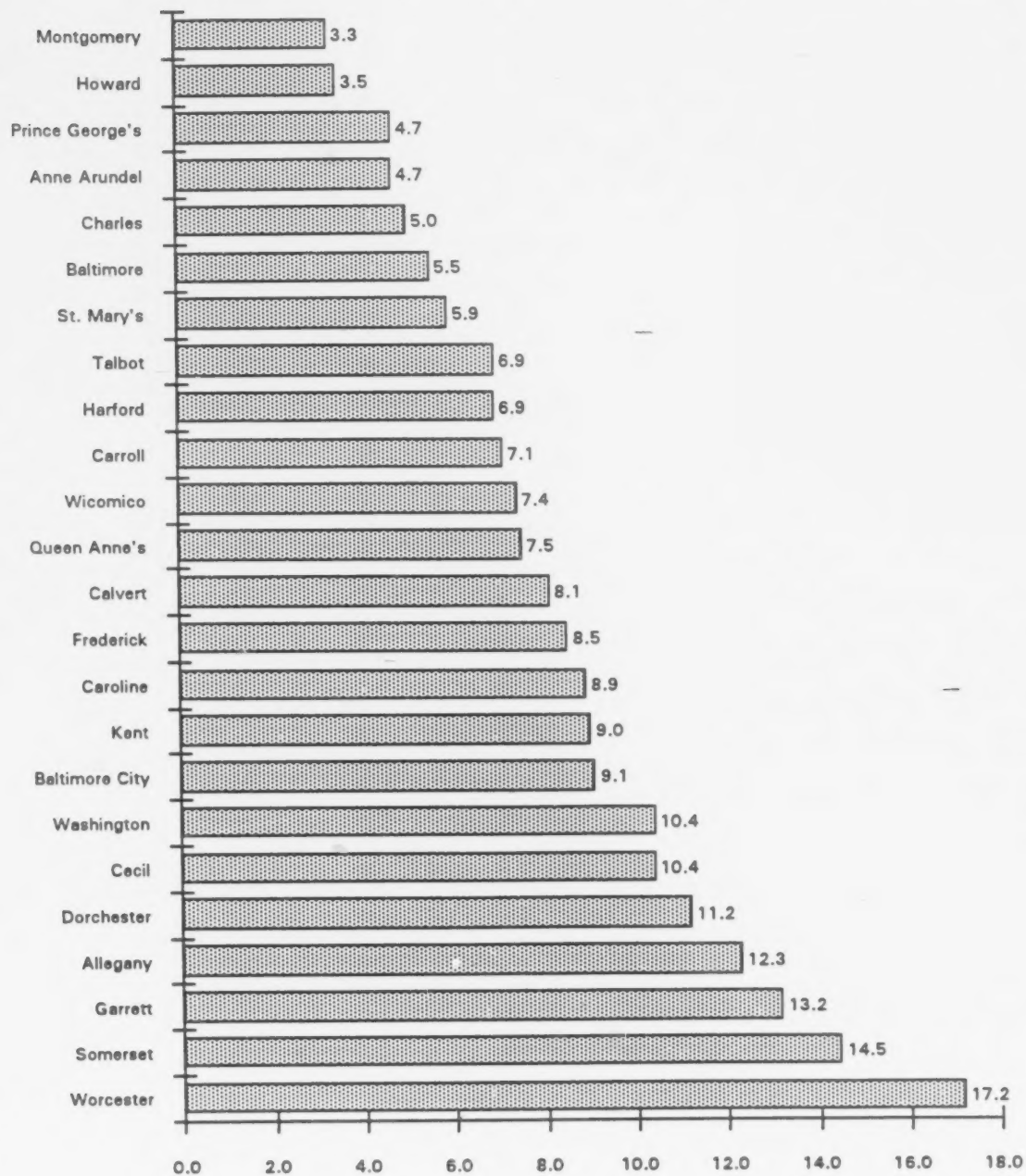
TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

	JANUARY 1991		DECEMBER 1990	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	152,091	6.1	150,788	6.1
BALTIMORE METROPOLITAN AREA	76,280	6.4	82,115	6.9
MARYLAND'S D.C. SUBURBS	44,134	4.5	41,792	4.3
WESTERN MARYLAND	12,344	11.4	10,198	9.6
BALANCE OF STATE	19,332	9.4	16,683	8.1

UNEMPLOYMENT RATES - JANUARY 1991



LOCAL UNEMPLOYMENT RATES-JANUARY 1991



STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE
JANUARY 1991

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	JANUARY	DECEMBER*	JANUARY	DECEMBER*	JANUARY	DECEMBER*	JANUARY	DECEMBER*	JAN. 1990
MARYLAND	2,476,241	2,489,018	2,324,150	2,338,230	152,091	150,788	6.1	6.1	4.3
BALTIMORE METROPOLITAN AREA	1,183,149	1,194,987	1,106,869	1,112,872	76,280	82,115	6.4	6.9	4.7
BALTIMORE CITY	337,653	342,975	307,068	308,733	30,585	34,242	9.1	10.0	7.0
ANNE ARUNDEL	209,797	211,590	199,945	201,029	9,852	10,561	4.7	5.0	2.9
BALTIMORE	382,666	386,724	361,470	363,431	21,196	23,293	5.5	6.0	4.2
CARROLL	63,169	62,679	58,664	58,982	4,505	3,697	7.1	5.9	4.0
HARFORD	82,621	82,907	76,883	77,300	5,738	5,607	6.9	6.8	6.2
HOWARD	91,239	92,315	88,040	88,518	3,199	3,797	3.5	4.1	1.9
QUEEN ANNE'S	16,002	15,797	14,799	14,879	1,203	918	7.5	5.8	4.5
D. C. AREA	978,260	980,523	934,126	939,131	44,134	41,792	4.5	4.3	2.8
CALVERT	23,597	23,229	21,690	21,807	1,907	1,422	8.1	6.1	4.6
CHARLES	46,847	46,796	44,502	44,740	2,345	2,056	5.0	4.4	2.8
FREDERICK	78,551	77,468	71,890	72,276	6,661	5,192	8.5	6.7	4.7
MONTGOMERY	417,091	419,412	403,309	405,470	13,782	13,942	3.3	3.3	2.1
PRINCE GEORGE'S	412,173	414,020	392,735	394,839	19,438	19,181	4.7	4.6	3.1
WESTERN MARYLAND	108,717	106,527	96,373	96,329	12,344	10,198	11.4	9.6	8.2
ALLEGANY	33,279	32,393	29,192	29,093	4,087	3,300	12.3	10.2	9.8
GARRETT	13,766	13,703	11,948	12,195	1,818	1,508	13.2	11.0	9.7
WASHINGTON	61,672	60,431	55,233	55,041	6,439	5,390	10.4	8.9	7.0
BALANCE OF STATE	206,114	206,581	186,782	190,898	19,332	16,683	9.4	8.1	7.1
CAROLINE	13,908	13,710	12,676	12,873	1,232	837	8.9	6.1	5.5
CECIL	36,436	34,973	32,655	32,335	3,781	2,638	10.4	7.5	9.5
DORCHESTER	17,350	16,856	15,414	16,346	1,936	1,510	11.2	9.0	8.4
KENT	8,841	8,856	8,044	8,334	797	522	9.0	5.9	6.5
ST. MARY'S	42,040	42,961	39,566	40,642	2,474	2,319	5.9	5.4	3.9
SOMERSET	12,117	12,837	10,356	11,055	1,761	1,782	14.5	13.9	10.6
TALBOT	17,327	17,788	16,138	16,641	1,189	1,147	6.9	6.4	4.9
WICOMICO	39,276	39,360	36,353	36,465	2,923	2,895	7.4	7.4	5.4
WORCESTER	18,819	19,240	15,580	16,207	3,239	3,033	17.2	15.8	13.3
UNITED STATES**	123,585,000	124,630,000	114,990,000	117,287,000	8,595,000	7,343,000	7.0	5.9	5.9

*Estimates for the state are revised.

**Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
BY REGION--JANUARY 1991

Industry	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	January 1991	December 1990	January 1991	December 1990	January 1991	December 1990	January 1991	December 1990
Total Nonagricultural Employment	1,126.7	1,160.4	764.4	789.1	92.1	94.5	135.0	140.8
Goods Producing	196.3	200.9	98.8	101.9	21.7	22.4	32.0	33.5
Mining	0.5	0.5	0.5	0.5	0.7	0.7	0.2	0.2
Construction	67.8	73.5	62.7	65.5	5.3	5.7	8.9	9.8
Manufacturing	128.0	126.9	35.6	35.9	15.7	16.0	22.9	23.5
Durable Goods	71.9	69.9	17.8	17.8	7.3	7.3	8.9	9.0
Nondurable Goods	56.1	57.0	17.8	18.1	8.4	8.7	14.0	14.5
Service Producing	930.4	959.5	665.6	687.2	70.4	72.1	103.0	107.3
Transportation & Public Utilities	54.8	56.3	33.0	34.4	5.1	5.2	7.4	7.4
Trade	262.9	274.9	197.1	206.5	26.1	26.9	32.8	35.5
Wholesale Trade	62.6	63.6	35.3	35.5	5.0	5.1	5.1	5.3
Retail Trade	200.3	211.3	161.8	171.0	21.1	21.8	27.7	30.2
Finance, Insurance, & Real Estate	75.4	75.8	46.2	46.7	3.1	3.2	5.0	4.8
Services	325.1	333.6	231.1	235.1	21.3	21.6	32.3	32.9
Total Government	212.2	218.9	158.2	164.5	14.8	15.2	25.5	26.7
Federal	50.0	51.5	71.6	72.2	1.8	1.8	6.8	6.8
State	71.0	71.8	16.3	17.8	4.9	4.9	5.1	5.8
Local	91.2	95.6	70.3	74.5	8.1	8.5	13.6	14.1

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	January 1991	December 1990	January 1990
Initial Claims	51,976	38,471	36,834
Weeks Claimed	313,108	226,647	231,153
First Payments	26,322	13,498	23,130
Final Payments	3,176	2,603	2,098
Weeks Paid	242,305	164,147	213,264
Net Benefit Amount	\$42,728,067	\$28,544,895	\$30,271,001
Average Check Amount	\$176.34	\$173.90	\$141.94

In January, for the second consecutive month, a marked increase was noted in the filings of both initial claims and weeks claimed in the regular unemployment insurance program. While some of this increase can be attributed to seasonality and the recent economic slowdown, January's upturn also reflects the rise in activity associated with quarterly changes in base year determinations.

During January, initial claims rose by slightly more than 35.0 percent, numbering just under 52,000, while weeks claimed increased by a greater 38.2 percent from 226,647 in December to 313,108 in January. Compared with a year ago, initial claims in January were up by 41.1 percent, or 15,142, and weeks claimed were about 35.5 percent above 1990 totals.

For the eighth straight month, the ratio of weeks paid to weeks claimed continued in the 70 percent range, with the ratio increasing from 72.4 percent in December to 77.4 percent in January. Just under 11.0 percent of all weeks paid during January represented first pays, up from 8.2 percent in December while the share of final pays declined somewhat over the month from 1.6 percent to 1.3 percent. During January, the ratio of first pays to total weeks paid was highest in the Western Region while the local offices in the Baltimore Metropolitan Area experienced the highest percentage of final pays.

Statewide, the average check amount rose from \$173.90 to \$176.34, an increase which when coupled with the surge in weeks paid resulted in a net benefit outlay of about \$42.7 million in January. Regionally, the average check amount in January ranged from a high of \$188.70 in the D.C. Area suburbs to a low of \$153.38 paid on claims filed in the Eastern Shore and Southern Maryland areas.



Department of Economic &
Employment Development

OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Euter Street
Baltimore, Maryland 21201



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LABOR MARKET DIMENSIONS

FEBRUARY, 1991

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
J. Randall Evans, Secretary

LABOR FORCE DEVELOPMENTS

With seasonal job creation at a near standstill and layoffs continuing to drag down employment levels in a number of industries, February's labor market activity provided a clear indication that the economic downturn has extended into the new year. The stability of January's unemployment rate was interrupted in February as joblessness moved up by 0.4 percentage points to 6.5 percent, reaching its highest level in eight years. Normally, very little change, if any, is noted in February's unemployment rate. Nationally, the jobless rate also rose over the month from 7.0 percent to 7.2 percent.

The upturn in Maryland's jobless estimate, which added slightly more than 9,000 workers to the unemployment rolls, left more than 161,000 people without jobs during February. This marked the sixth consecutive month of rising unemployment in Maryland. Following a seasonal decline in August 1990, unemployment broke away from normal patterns and has been trending upward ever since.

	February 1991	January 1991	February 1990
Civilian Labor Force	2,489,630	2,476,108	2,527,231
Total Employment	2,328,512	2,324,021	2,422,332
Total Unemployment	161,118	152,087	104,599
Unemployment Rate	6.5	6.1	4.1
National Unemployment Rate	7.2	7.0	5.8

During February, the unemployment count rose despite the fact that the number of jobholders also increased by nearly 4,500. February's employment increase, however, resulted primarily from recall activity, specifically in education, rather than from actual new job generation. This left fewer opportunities available for incoming jobseekers, causing the seasonal increase in the labor force to fall disproportionately upon the unemployment side of the ledger.

The impact of the recession on statewide economics is particularly evident when examining labor market developments over the past year. Since February 1990, the number of employed residents has declined by more than 94,100. Nearly two-thirds of this decline was reflected on the unemployment rolls, causing the statewide unemployment rate to rise significantly from February 1990's rate of 4.1 percent.

INDUSTRY DEVELOPMENTS

Maryland's employment situation showed very little improvement during February. After falling by nearly 70,000 jobs, industry payrolls headed back up in February, with recall activity in educational services and state and local education supporting this gain. While some private sector employers expanded their payrolls, normal seasonal hiring patterns failed to materialize. In all, Maryland's industry payrolls rose by just 8,200 jobs in February, an increase less than half February 1990's gain of 19,100.

The construction industry continued to turn in a poor performance, with further job losses lowering employment to 145,100. This marks the seventh consecutive month of declining employment in this industry. While weather conditions were a factor in the job declines among heavy contractors, layoffs reported by general building contractors reflected the current posture in the commercial and residential building markets. Countering these losses somewhat, employment among special trade contractors rose by 500 jobs during February. Although rising, employment in this component, at 92,300, has dropped considerably from last February's job count of 94,600.

Employment in manufacturing continued to tumble downward with losses reported at about 1,300. Declines were heaviest in durable goods where job losses in primary metals, electronic equipment and transportation equipment, when combined, accounted for slightly more than 90.0 percent of the overall manufacturing decline. Nondurables held fairly steady as job declines in rubber, apparel and paper products were countered by gains in the food processing industry. In spite of layoffs, the average workweek for production workers in Maryland's manufacturing industries rose slightly to 40.3 hours in February. This increase, coupled with a \$.05 rise in hourly pay rates, raised weekly earnings by about \$4.36 to \$475.54 in February. Workweeks were lengthened and paychecks increased in both the durable and nondurable components. In durable goods, however, a number of industries cutback work schedules, with the largest reduction reported in fabricated metals. A loss of overtime hours in this industry caused weekly paychecks to drop sharply, by almost \$20.00, to \$425.01 in February. In nondurables, on the other hand, all industries, with the exception of paper products, reported a lengthening in workweeks. The largest increase occurred in rubber products as employers sought to maintain required production levels with fewer workers.

Within the service-producing sector, individual industry performance was mixed. Activity was, however, centered primarily in retail trade, services and government. In retail trade, post holiday layoffs continued to dominate the industry. In all, about 4,500 jobs were pared from payrolls during February, with slightly more than 75.0 percent of this reduction occurring in general merchandise stores. Layoff activity was also noted in apparel, food and miscellaneous retail stores. The impact of these declines was minimized somewhat by an upswing in employment at eating and drinking establishments. Meanwhile, in services, a number of industries increased their job count, including business, amusement, personal and health services. The largest increase, of about 2,900 jobs, occurred in educational services as colleges and universities reopened following semester breaks. The benefit of this recall activity also elevated job counts in state and local education during February.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
FEBRUARY 1991

Industry	February 1991	January 1991	February 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,131.0	2,122.8	2,135.5
Goods Producing	347.4	349.1	361.1
Mining	2.0	2.0	1.9
Construction	145.1	145.5	152.0
Heavy Construction	14.8	15.0	16.3
Manufacturing	200.3	201.6	207.2
Durable Goods	104.6	105.7	110.6
Lumber & Wood Products	3.9	4.0	3.9
Stone, Clay, & Glass Products	8.0	7.9	8.3
Concrete, Gypsum, Plaster	5.0	5.0	5.2
Other Stone, Clay, & Glass	3.0	2.9	3.1
Primary Metal Industries	10.4	10.8	10.9
Blast Furnaces	8.6	9.0	9.1
Fabricated Metal Products	9.8	9.9	9.8
Fabricated Structural Metal Products	4.1	4.1	4.1
Other Fabricated Metal Products	4.6	4.7	4.6
Industrial Machinery	16.0	15.7	17.2
Refrigeration & Service Mach.	2.2	1.9	2.5
Other Industrial Machinery & Equipment	9.5	9.5	10.0
Electronic Equipment	14.8	15.1	16.7
Communications Equipment	4.3	4.5	4.5
Electronic Component	3.7	3.7	4.5
Other Electronic Equipment	6.8	6.9	7.7
Transportation Equipment	12.9	13.2	13.9
Motor Vehicles	5.2	5.5	5.4
Other Transportation	3.0	3.0	3.2
Instruments & Related	23.3	23.5	24.4
Miscellaneous Manufacturing	2.7	2.7	2.7
Nondurable Goods	95.7	95.9	96.6
Food & Kindred Products	24.5	24.2	24.1
Meat Products	6.0	5.9	5.7
Beverages	4.1	4.2	4.2
Other Food & Kindred	9.7	9.5	9.8
Textile Mill, Apparel	9.7	9.7	10.0
Paper & Allied Products	9.5	9.6	9.4
Printing & Publishing	28.1	28.2	28.8
Chemicals and Allied Products	13.7	13.7	13.8
Rubber & Miscellaneous	8.2	8.4	8.3
Other Nondurable Goods	2.0	2.1	2.2

Industry	February 1991	January 1991	February 1990
Service Producing	1,783.6	1,773.7	1,774.4
Transportation & Public Utilities	99.7	99.8	99.0
Transportation	55.4	55.5	55.0
Railroad Transportation	4.4	4.4	4.6
Trucking & Warehousing	28.0	28.4	27.7
Communications & Utilities	44.3	44.3	44.0
Communications	28.0	27.9	27.9
Electric, Gas, Sanitary	16.3	16.4	16.1
Trade	514.1	518.7	517.5
Wholesale Trade	108.3	108.4	108.4
Retail Trade	405.8	410.3	409.1
Building Materials, Garden Supplies	16.5	16.4	16.5
General Merchandise	43.3	46.7	44.3
Food Stores	66.0	66.7	65.0
Eating & Drinking Places	125.5	124.6	126.8
Finance, Insurance, & Real Estate	131.2	130.9	130.5
Finance	58.0	58.1	58.7
Depository Institutions	42.4	42.6	42.9
Commercial Banks	27.3	27.4	27.7
Insurance	39.2	39.0	38.1
Insurance Carriers	26.2	26.0	25.2
Real Estate	34.0	33.8	33.7
Services	614.4	609.0	607.4
Business Services	132.6	131.7	133.1
Health Services	161.6	161.3	154.8
Hospitals	79.8	79.9	75.7
Legal Services	15.9	15.9	15.8
Educational Services	36.5	33.6	36.2
Private Colleges, Universities	19.0	16.5	18.5
Total Government	424.2	415.3	420.0
Total Federal Government	132.6	132.6	132.9
Department of Defense	47.4	47.2	47.2
Other Federal Government	85.2	85.4	85.7
Total State & Local Government	291.6	282.7	287.1
Total State Government	99.4	96.9	98.6
State Education	32.9	30.4	32.5
Other State Government	66.5	66.5	66.1
Total Local Government	192.2	185.8	188.5
Local Education	116.0	110.2	115.3
Other Local Government	76.2	75.6	73.2

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES **FEBRUARY 1991**

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	February 1991	January 1991	February 1991	January 1991	February 1991	January 1991
MARYLAND						
Manufacturing	40.3	40.1	\$475.54	\$471.18	\$11.80	\$11.75
Durable Goods	41.7	41.6	518.75	516.26	12.44	12.41
Lumber and Wood Products	38.6	38.9	344.70	342.32	8.93	8.80
Stone, Clay, and Glass Products	43.2	42.9	500.26	493.78	11.58	11.51
Primary Metal Industries	42.6	42.1	703.75	691.70	16.52	16.43
Blast Furnaces	43.0	42.7	724.55	712.24	16.85	16.68
Fabricated Metals	40.4	41.6	425.01	443.87	10.52	10.67
Industrial Machinery	41.9	41.3	537.58	520.38	12.83	12.60
Electronic Equipment	47.6	45.5	453.63	424.97	9.53	9.34
Transportation Equipment	39.0	39.6	614.64	616.57	15.76	15.57
Instruments and Related Products	39.5	40.3	511.53	526.72	12.95	13.07
Miscellaneous Manufacturing Industries	39.7	40.0	371.99	376.00	9.37	9.40
Nondurable Goods	39.2	38.8	439.04	431.46	11.20	11.12
Food and Kindred Products	39.4	38.9	407.00	395.61	10.33	10.17
Textile Mill, Apparel	35.0	34.0	262.50	253.30	7.50	7.45
Paper and Allied Products	41.6	42.5	488.38	501.50	11.74	11.80
Printing and Publishing	36.4	36.0	491.40	478.80	13.50	13.30
Chemicals and Allied Products	42.7	42.5	546.13	537.63	12.79	12.65
Rubber and Plastic Products	43.6	43.0	436.00	427.85	10.00	9.95
BALTIMORE METROPOLITAN AREA						
Manufacturing	40.7	40.4	\$500.20	\$495.71	\$12.29	\$12.27
Durable Goods	41.2	41.1	540.54	538.82	13.12	13.11
Nondurable Goods	40.2	39.8	459.08	452.13	11.42	11.36

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

In the Baltimore Metro Area, February's statistics were indicative of the recent cooling in the regional economy. Unemployment in the region shot up by 0.6 percentage points, reaching 7.0 percent in February. About three-fourths of the statewide unemployment increase over the month was reflected in the Metro Area profile. More than 83,300 area residents found themselves without a job during February, up from January's estimate of 76,365. February's jobless increase was driven primarily by expansion in the labor force. Jobless rates climbed throughout the region with the exception of Queen Anne's County where a slight increase in employment, combined with a decline in the labor force, helped to reduce joblessness to 7.2 percent in February. In Harford County where the unemployment rate advanced by nearly 2.0 full percentage points, from 6.9 percent to 8.7 percent, a number of layoffs were reported in manufacturing and construction.

MARYLAND'S D.C. SUBURBS

Unemployment in Maryland's D.C. suburbs, holding at January's rate of 4.5 percent, formed the lower end of the regional jobless ranking. Although the region's unemployment rate remained unaltered, there was considerable movement in the job market. Employment in the region grew by 3,680 in February, representing just over 80.0 percent of the overall statewide increase. As the number of employed suburbanites rose, the region's unemployment rolls dropped back, albeit marginally by 231 persons, lowering the jobless count to 43,959 persons in February. While all of the suburban counties shared in the region's employment increase, Frederick was the only county in which unemployment declines were visible. In Frederick, rising employment, coupled with a slight drop in the labor force, helped to reduce unemployment volume by 324 persons and to lower the jobless rate by 0.4 percentage points to 8.1 percent. Employment in Frederick rose in response to recall activity in education and manufacturing along with hiring in personal and business services.

WESTERN MARYLAND

In Western Maryland, a reduction in the regional labor force was the primary factor responsible for lowering the jobless rate to 11.3 percent in February, down from January's rate of 11.4 percent. Unemployment in the region, while declining, is substantially higher than last February's estimate of 7.5 percent. The benefit of the current jobless decline was restricted solely to Washington County. In Washington, a monthly employment decline of 315 persons, many of whom came from the manufacturing industry, was more than offset by a corresponding decline in the labor force. The net result was a reduction in the county's jobless rate from 10.5 percent to 10.3 percent. Meanwhile, a contrasting picture unfolded in Garrett County whereby employment gains were cancelled out by expansion in the labor force, causing joblessness to advance to 13.3 percent in February.

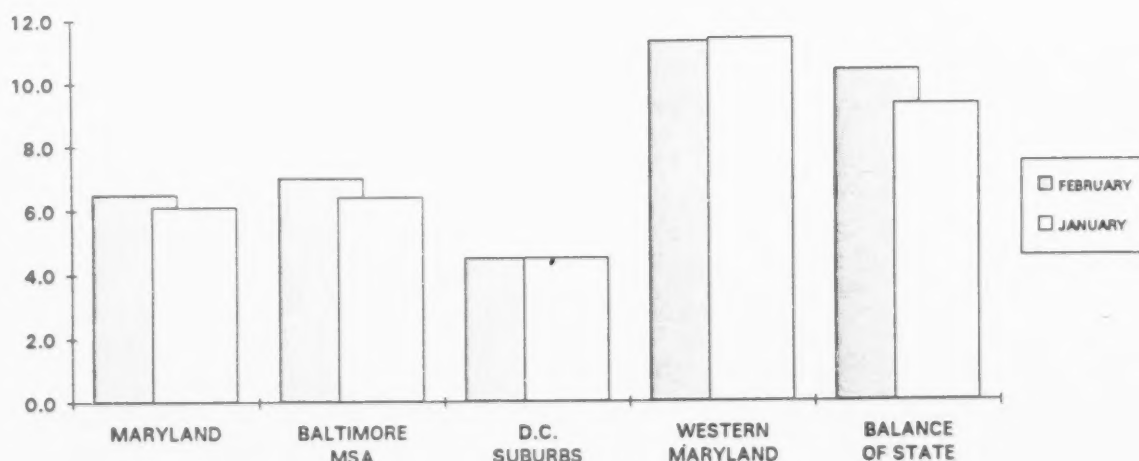
BALANCE OF STATE

Labor market activity in the Balance of State Area also showed signs of increasing joblessness during February. More than 2,300 area residents joined the ranks of the unemployed, pushing the jobless rate up from 9.3 percent in January to 10.4 percent in February. Unemployment rates escalated in each of the area's local jurisdictions with the exception of Worcester County where an upswing in employment eased unemployment down from 17.3 percent to 15.8 percent. Even with this decline, Worcester continued to top the county unemployment chart for the fourth consecutive month. The largest rate hike, from 10.1 percent to 14.1 percent, occurred in Cecil County where furloughs among workers in the auto and related industries contributed to increased claims activity.

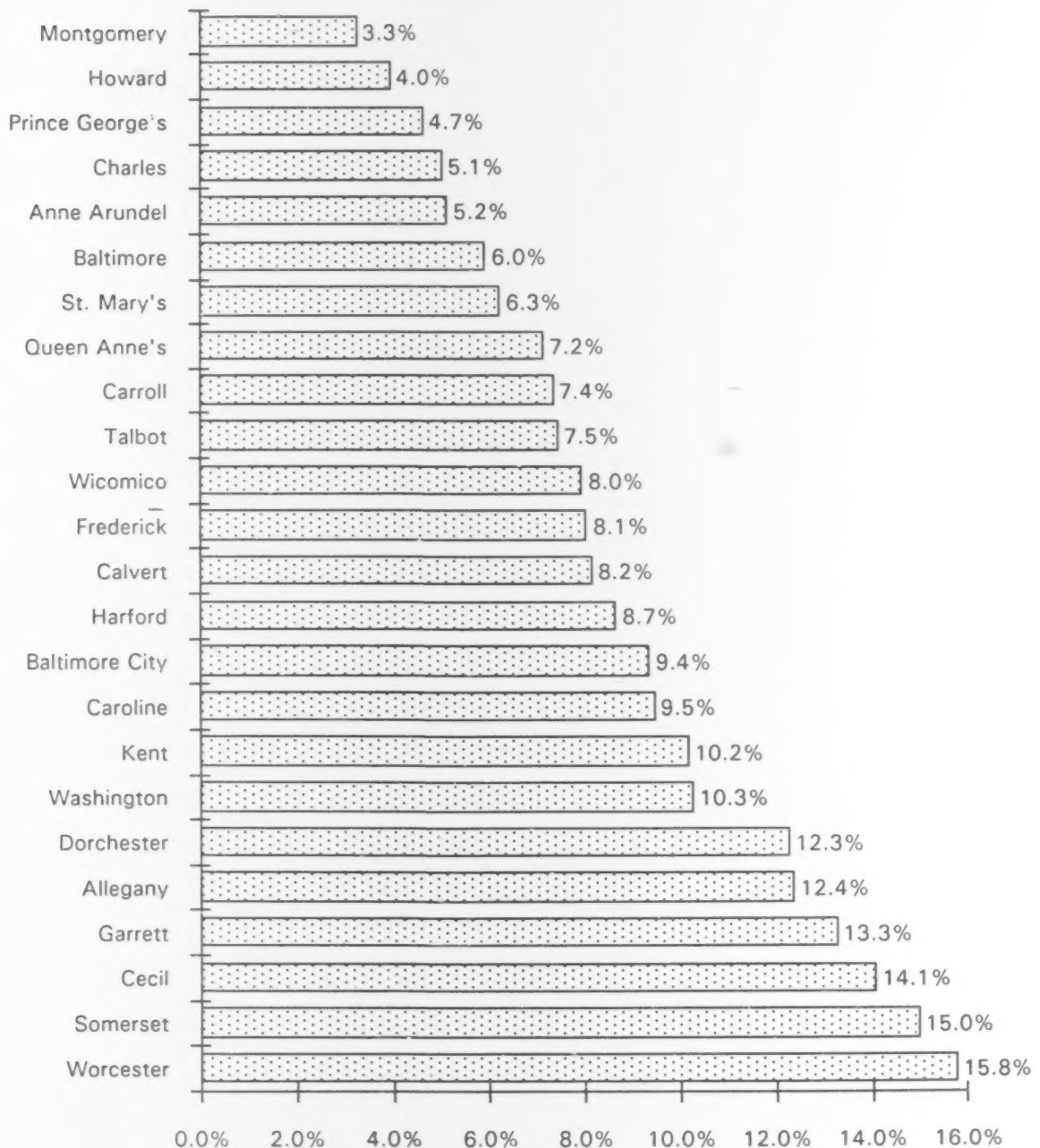
TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

	FEBRUARY 1991		JANUARY 1991	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	161,118	6.5	152,087	6.1
BALTIMORE METROPOLITAN AREA	83,349	7.0	76,365	6.4
MARYLAND'S D.C. SUBURBS	43,959	4.5	44,190	4.5
WESTERN MARYLAND	12,221	11.3	12,303	11.4
BALANCE OF STATE	21,589	10.4	19,231	9.3

UNEMPLOYMENT RATES - FEBRUARY 1991



LOCAL UNEMPLOYMENT RATES-FEBRUARY 1991



MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 NORTH EUTAW STREET
BALTIMORE, MARYLAND 21201

STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

FEBRUARY 1991

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	FEBRUARY	JANUARY*	FEBRUARY	JANUARY*	FEBRUARY	JANUARY*	FEBRUARY	JANUARY*	FEB. 1990
MARYLAND	2,489,630	2,476,108	2,328,512	2,324,021	161,118	152,087	6.5	6.1	4.1
BALTIMORE METROPOLITAN AREA	1,193,150	1,185,541	1,109,801	1,109,176	83,349	76,365	7.0	6.4	4.5
BALTIMORE CITY	339,911	338,397	307,881	307,708	32,030	30,689	9.4	9.1	7.0
ANNE ARUNDEL	211,560	210,296	200,474	200,362	11,086	9,934	5.2	4.7	3.0
BALTIMORE	385,758	383,442	362,428	362,224	23,330	21,218	6.0	5.5	3.8
CARROLL	63,535	63,161	58,819	58,786	4,716	4,375	7.4	6.9	3.6
HARFORD	84,397	82,783	77,087	77,043	7,310	5,740	8.7	6.9	4.9
HOWARD	91,991	91,423	88,274	88,224	3,717	3,199	4.0	3.5	2.0
QUEEN ANNE'S	15,996	16,039	14,838	14,830	1,158	1,209	7.2	7.5	4.2
D. C. AREA	980,231	976,782	936,272	932,592	43,959	44,190	4.5	4.5	2.8
CALVERT	23,673	23,581	21,740	21,655	1,933	1,926	8.2	8.2	3.8
CHARLES	47,016	46,795	44,604	44,429	2,412	2,366	5.1	5.1	2.7
FREDERICK	78,417	78,458	72,055	71,772	6,362	6,686	8.1	8.5	4.4
MONTGOMERY	418,057	416,433	404,235	402,647	13,822	13,786	3.3	3.3	2.2
PRINCE GEORGE'S	413,067	411,515	393,637	392,090	19,430	19,425	4.7	4.7	3.1
WESTERN MARYLAND	107,726	108,054	95,505	95,751	12,221	12,303	11.3	11.4	7.5
ALLEGANY	33,146	33,093	29,032	29,005	4,114	4,088	12.4	12.4	9.3
GARRETT	13,737	13,647	11,910	11,868	1,827	1,779	13.3	13.0	9.9
WASHINGTON	60,843	61,314	54,563	54,878	6,280	6,436	10.3	10.5	6.0
BALANCE OF STATE	208,525	205,697	186,936	186,502	21,589	19,231	10.4	9.3	5.5
CAROLINE	14,078	13,886	12,745	12,646	1,333	1,240	9.5	8.9	5.2
CECIL	37,371	36,406	32,119	32,716	5,252	3,690	14.1	10.1	7.2
DORCHESTER	17,375	17,301	15,234	15,378	2,141	1,923	12.3	11.1	8.8
KENT	9,017	8,817	8,098	8,027	919	790	10.2	9.0	6.5
ST. MARY'S	42,403	41,960	39,734	39,484	2,669	2,476	6.3	5.9	4.2
SOMERSET	12,336	12,092	10,491	10,333	1,845	1,759	15.0	14.5	11.4
TALBOT	17,490	17,295	16,178	16,105	1,312	1,190	7.5	6.9	4.5
WICOMICO	39,648	39,148	36,494	36,269	3,154	2,915	8.0	7.4	5.7
WORCESTER	18,807	18,792	15,843	15,544	2,964	3,248	15.8	17.3	11.9
¹ UNITED STATES	124,070,000	123,585,000	115,151,000	114,990,000	8,919,000	8,595,000	7.2	7.0	5.8

*Estimates for the state are revised.

¹

Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
BY REGION--FEBRUARY 1991

Industry	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	February 1991	January 1991	February 1991	January 1991	February 1991	January 1991	February 1991	January 1991
Total Nonagricultural Employment	1,133.8	1,131.4	769.9	765.8	91.5	91.7	136.3*	135.0
Goods Producing	193.9	196.0	98.6	98.6	21.5	21.6	32.1	31.9
Mining	0.5	0.5	0.5	0.5	0.7	0.7	0.2	0.2
Construction	67.2	68.0	62.0	62.3	5.2	5.2	9.0	8.8
Manufacturing	126.2	127.5	36.1	35.8	15.6	15.7	22.9	22.9
Durable Goods	70.3	71.3	18.2	17.8	7.1	7.3	8.9	8.9
Nondurable Goods	55.9	56.2	17.9	18.0	8.5	8.4	14.0	14.0
Service Producing	939.9	935.4	671.3	667.2	70.0	70.1	104.2	103.1
Transportation & Public Utilities	55.0	55.0	33.4	33.3	5.0	5.0	7.3	7.2
Trade	260.3	263.4	195.6	197.2	25.8	26.2	33.0	33.1
Wholesale Trade	62.5	62.6	35.6	35.3	5.0	5.0	5.0	5.1
Retail Trade	197.8	200.8	160.0	161.9	20.8	21.2	28.0	28.0
Finance, Insurance, & Real Estate	75.5	75.5	46.1	46.1	3.1	3.1	4.9	4.9
Services	330.4	326.9	232.1	230.3	21.3	21.3	32.5	32.4
Total Government	218.7	214.6	164.1	160.3	14.8	14.5	26.5	25.5
Federal	50.2	50.5	72.5	72.6	1.8	1.8	6.8	6.8
State	72.5	71.4	17.8	17.2	4.7	4.7	5.7	5.1
Local	96.0	92.7	73.8	70.5	8.3	8.0	14.0	13.6

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	February 1991	January 1991	February 1990
Initial Claims	30,622	51,976	17,807
Weeks Claimed	334,233	313,108	187,805
First Payments	22,874	26,322	10,487
Final Payments	3,084	3,176	1,683
Weeks Paid	281,939	242,305	170,860
Net Benefit Amount	\$50,486,685	\$42,728,067	\$23,764,979
Average Check Amount	\$179.07	\$176.34	\$139.09

Following January's seasonal increase, initial claims filings reported by Maryland's unemployment insurance offices during February dropped by more than 20,000, or by just over 41.0 percent. While the number of initial claims dwindled, the high level of claims filed in January contributed to an increase in February's estimates of both weeks claimed and weeks paid.

Weeks claimed rose from 313,108 in January to 334,233 in February, for an increase of 6.7 percent. At the same time, the number of weeks compensated jumped by almost 40,000 to 281,939 in February. The ratio of weeks paid to weeks claimed increased to 84.4 percent in February, up from January's figure of 77.4 percent. Last February, the compensation rate was much higher at 91.0 percent.

During February, the average check amount rose for the third consecutive month to \$179.07. This increase in weekly allowance checks, coupled with a 16.4 percent increase in weeks paid, lifted February's benefit outlay to just under \$50.5 million, about \$7.8 million above January's disbursement and more than double February 1990's payout of about \$23.8 million.

Since last February, all unemployment compensation measurements have risen, with the largest increase, of just over 118 percent, occurring in the number of first payments. The downward trend in the economy over the past year has weighed heavily upon the ability of unemployed workers to find employment as illustrated by the appreciable rise, of about 83.0 percent, in the number of exhaustions since February 1990.

 Maryland
Department of Economic &
Employment Development

OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
Baltimore, Maryland 21201



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LABOR MARKET DIMENSIONS

MARCH, 1991

**Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201**

**William Donald Schaefer, Governor
J. Randall Evans, Secretary**

LABOR FORCE DEVELOPMENTS

Seasonal employment growth, although proceeding at a somewhat slower pace, revived Maryland's job market during March, providing a welcome respite from months of rising unemployment. Responding to the expansion in employment opportunities, total unemployment in the state declined by one-half a percentage point to 6.0 percent in March. This decline placed Maryland's rate well below the national estimate which also dropped, albeit minimally, from 7.2 percent to 7.1 percent.

Both the labor force and employment levels, while remaining below pre-recession levels, headed back up in March. Recouping a portion of the losses experienced during the latter part of 1990, the statewide labor force grew by an estimated 21,643 persons during March, rising to 2,512,325. Meanwhile, the number of jobholders grew by slightly more than 32,500—an increase which was both strong enough to absorb the influx of new and re-entrant jobseekers and, at the same time, to reduce the jobless count by an estimated 10,900 persons.

	March 1991	February 1991	March 1990
Civilian Labor Force	2,512,325	2,490,682	2,535,748
Total Employment	2,362,426	2,329,883	2,442,609
Total Unemployment	149,899	160,799	93,139
Unemployment Rate	6.0	6.5	3.7
National Unemployment Rate	7.1	7.2	5.4

As has been the pattern for the past several months, labor market changes over the year have shown relatively large declines in both the labor force and employment. Employment declines, however, have outdistanced those in the labor force, causing a significant increase in the level as well as the rate of unemployment. Since last March, nearly 80,200 Marylanders have lost their jobs. While a number of these workers chose to abandon their work search and withdraw from the job market, nearly 56,800 idled workers were added to the unemployment rolls, causing the jobless rate to rise sharply from 3.7 percent in March, 1990 to 6.0 percent in March, 1991. Historically, the current March rate is the highest for the month since March 1983 when a rate of 7.6 percent was reported.

INDUSTRY DEVELOPMENTS

Activity on Maryland's industrial payrolls during March, for the most part, followed normal seasonal patterns. Job creation, however, was much less than anticipated. During March, industrial payrolls rose by 15,700, falling short of last year's gain by about 9,600 jobs. While growth occurred in both the goods-producing and service-producing sectors, March's strength was drawn primarily from expansion in the service economy. Nearly 85.0 percent of the monthly increase resulted from job creation among service-producers, with overall performance paced primarily by the services and trade industries.

Employment in the services group moved up by 7,600 jobs during March. Health services, one of the industries which has, with but a few exceptions, turned in a positive performance throughout the recession, added another 600 jobs during March. In keeping with current trends, hiring in health care occurred primarily outside the hospital setting. Business services also made a respectable showing, with job gains reported in personnel supply and computer service firms. Other gains within services were largely seasonal, with sizeable contributions resulting from renewed hiring in agricultural services and amusements. In educational services, continuing recall activity at private colleges and universities caused employment to rise.

In the trade sector, job gains of about 3,300 during March were confined solely to the retail component. Performance was mixed in this industry group. Hefty increases were reported in eating and drinking establishments while moderate hiring was noted at hardware stores, auto dealers and apparel stores. These increases, when combined, helped to offset employment declines in general merchandise and food stores.

On the goods-producing side of the economy, a net gain of 2,500 jobs reversed the downward trend which has been curbing employment in this component for the past five months. The cloud which has been looming over the construction industry appeared to be lifting in March, with employment expanding by 4,200 jobs. Despite this gain, employment in construction is nearly 7,000 short of its year ago level. The pick-up occurred primarily among heavy and special trade contractors while conditions in general building remained relatively soft. On the flip side, normal seasonal trends in manufacturing were skewed by a sizeable layoff in instruments and related products which cost in excess of 1,200 jobs in this individual industry line. When combined with layoffs in primary metals, industrial machinery, electronic and transportation equipment, the net result was an overall manufacturing loss of 1,800 jobs in March.

While overall employment in manufacturing dropped, this decline did not impact upon wage and hour statistics. As a matter of fact, weekly wages in manufacturing rose by \$3.20 to \$478.34 in March—an increase which resulted from a \$.05 rise in hourly pay rates combined with a slight lengthening in work schedules from 40.3 hours to 40.4 hours. Changes in durable goods were substantially higher than those in the nondurable component. In durables, a lengthening of 0.3 hour in the average workweek in conjunction with an increase in hourly earnings from \$12.44 to \$12.50, yielded a weekly paycheck of \$525.00 in March. Within durables, shortened workweeks resulted in smaller weekly paychecks in both stone products and primary metals. In nondurables manufacturing, workweeks dropped slightly from 39.1 hours to 39.0 hours, yet weekly paychecks still rose from \$436.75 to \$437.19. The most significant change in nondurables occurred in chemical products where a 2.0 hour reduction in overtime hours lowered paychecks by \$35.95 to \$552.55 in March.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
MARCH 1991

Industry	March 1991	February 1991	March 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,151.5	2,135.8	2,160.8
Goods Producing	351.0	348.5	367.1
Mining	2.1	2.0	2.0
Construction	150.6	146.4	157.4
Heavy Construction	17.4	15.6	18.4
Manufacturing	198.3	200.1	207.7
Durable Goods	102.4	104.5	111.2
Lumber & Wood Products	3.9	3.9	4.0
Stone, Clay, & Glass Products	8.0	8.0	8.5
Concrete, Gypsum, Plaster	5.0	5.0	5.3
Other Stone, Clay, & Glass	3.0	3.0	3.2
Primary Metal Industries	10.1	10.3	10.8
Blast Furnaces	8.4	8.5	9.1
Fabricated Metal Products	9.7	9.7	9.9
Fabricated Structural Metal Products	4.0	4.0	4.2
Other Fabricated Metal Products	4.6	4.6	4.6
Industrial Machinery	15.8	16.0	17.1
Refrigeration & Service Mach.	2.2	2.2	2.4
Other Industrial Machinery & Equipment	9.4	9.5	10.0
Electronic Equipment	14.6	14.8	16.7
Communications Equipment	4.2	4.3	4.5
Electronic Component	3.7	3.7	4.5
Other Electronic Equipment	6.7	6.8	7.7
Transportation Equipment	12.5	12.8	14.3
Motor Vehicles	5.2	5.2	5.7
Other Transportation	2.7	3.0	3.4
Instruments & Related	22.3	23.5	24.3
Miscellaneous Manufacturing	2.6	2.7	2.7
Nondurable Goods	95.9	95.6	96.5
Food & Kindred Products	24.7	24.5	24.0
Meat Products	6.1	6.0	5.6
Beverages	4.2	4.1	4.2
Other Food & Kindred	9.8	9.7	9.8
Textile Mill, Apparel	9.9	9.8	10.2
Paper & Allied Products	9.6	9.5	9.4
Printing & Publishing	27.9	28.0	28.8
Chemicals and Allied Products	13.7	13.6	13.7
Rubber & Miscellaneous	8.1	8.2	8.3
Other Nondurable Goods	2.0	2.0	2.1

Industry	March 1991	February 1991	March 1990
Service Producing	1,800.5	1,787.3	1,793.7
Transportation & Public Utilities	101.8	100.6	100.6
Transportation	57.2	56.3	56.3
Railroad Transportation	4.4	4.4	4.7
Trucking & Warehousing	29.5	28.9	28.5
Communications & Utilities	44.6	44.3	44.3
Communications	28.2	28.0	28.2
Electric, Gas, Sanitary	16.4	16.3	16.1
Trade	517.0	513.7	522.1
Wholesale Trade	108.3	108.3	109.2
Retail Trade	408.7	405.4	412.9
Building Materials, Garden Supplies	17.0	16.5	17.1
General Merchandise	42.8	43.4	43.9
Food Stores	65.7	66.0	65.1
Eating & Drinking Places	128.9	125.5	129.7
Finance, Insurance, & Real Estate	130.9	131.2	131.1
Finance	57.6	58.0	58.8
Depository Institutions	42.1	42.4	43.0
Commercial Banks	27.1	27.3	27.8
Insurance	39.1	39.2	38.2
Insurance Carriers	26.1	26.2	25.2
Real Estate	34.2	34.0	34.1
Services	623.8	616.2	616.5
Business Services	133.5	132.7	134.5
Health Services	162.0	161.4	156.0
Hospitals	80.0	79.8	76.3
Legal Services	16.0	15.9	15.8
Educational Services	37.5	36.6	37.3
Private Colleges, Universities	19.8	19.0	19.5
Total Government	427.0	425.6	423.4
Total Federal Government	132.6	132.6	133.2
Department of Defense	47.3	47.4	47.3
Other Federal Government	85.3	85.2	85.9
Total State & Local Government	294.4	293.0	290.2
Total State Government	101.0	100.3	99.4
State Education	34.5	33.8	33.0
Other State Government	66.5	66.5	66.4
Total Local Government	193.4	192.7	190.8
Local Education	118.0	116.3	117.0
Other Local Government	75.4	76.4	73.8

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES MARCH 1991

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	March 1991	February 1991	March 1991	February 1991	March 1991	February 1991
MARYLAND						
Manufacturing					\$11.84	\$11.79
Durable Goods	40.4	40.3	\$478.34	\$475.14	12.50	12.44
Lumber and Wood Products	42.0	41.7	525.00	518.75	8.85	8.85
Stone, Clay, and Glass Products	38.7	38.5	342.50	340.73	11.46	11.60
Primary Metal Industries	43.0	43.5	492.78	504.60	16.22	16.28
Blast Furnaces	41.7	42.4	676.37	690.27	16.50	16.61
Fabricated Metals	42.0	42.7	693.00	709.25	10.59	10.48
Industrial Machinery	41.2	41.2	436.31	431.78	13.00	12.83
Electronic Equipment	42.4	41.7	551.20	535.01	9.55	9.52
Transportation Equipment	47.0	47.1	448.85	448.39	15.84	15.84
Instruments and Related Products	39.8	38.4	630.43	608.26	13.70	13.35
Miscellaneous Manufacturing Industries	42.8	40.8	586.36	544.68	9.55	9.35
	39.2	39.0	374.36	364.65		
Nondurable Goods	39.0	39.1	437.19	436.75	11.21	11.17
Food and Kindred Products	39.4	39.1	410.55	403.51	10.42	10.32
Textile Mill, Apparel	34.8	35.0	267.96	266.00	7.70	7.60
Paper and Allied Products	41.8	41.6	495.33	487.14	11.85	11.71
Printing and Publishing	37.3	36.4	501.69	483.03	13.45	13.27
Chemicals and Allied Products	41.0	43.0	516.60	552.55	12.60	12.85
Rubber and Plastic Products	42.5	43.2	418.63	434.16	9.85	10.05
BALTIMORE METROPOLITAN AREA						
Manufacturing	40.9	40.7	\$502.66	\$501.42	\$12.29	\$12.32
Durable Goods	41.8	41.3	550.09	543.51	13.16	13.16
Nondurable Goods	39.9	40.1	453.66	457.54	11.37	11.41

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Seasonal expansion also helped to alleviate unemployment in the Baltimore Metro Area where a decline of slightly more than 1,800 persons on the region's jobless rolls eased the area's unemployment rate down from 7.0 percent in February to 6.8 percent in March. All of the region's jurisdictions, with the exception of Baltimore County where unemployment held steady at 6.0 percent, reported lower jobless rates during March. In the central locales, specifically Anne Arundel and Baltimore City, unemployment declines were moderated by layoffs in the manufacturing industry. In both Carroll and Harford counties, declines of almost a full percentage point lowered unemployment rates to 6.6 percent and 7.7 percent, respectively. Even with these declines, unemployment rates in these two counties were more than double those reported last year at this time. On a regional basis, hiring activity was strongest in eating and drinking places, business services, special trade contractors, and state education. Job declines, on the other hand, were reported in a number of industries, with losses in instruments manufacturing accounting for slightly more than 80.0 percent of the Metro Area's manufacturing decline.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. Suburbs, unemployment also subsided from 4.5 percent in February to 4.1 percent in March. Employment in the region rose by more than 12,000, an increase which helped to lower the unemployment count by 3,264 to 40,828 in March. All of the suburban counties contributed to this decline, with the largest change occurring in Frederick County. In Frederick, the stability of the labor force helped to maximize the increase in employment and to reduce joblessness by more than a full percentage point to 6.9 percent in March. Montgomery, with an unemployment rate of 3.1 percent, held its position at the low end of the jobless spectrum for the fifth consecutive month. As was true statewide, industrial payrolls, while moving ahead in March, expanded much more slowly than anticipated. The overall gain was paced primarily by gains in the services industry, with hiring activity noted in engineering and business services, amusements and membership organizations.

WESTERN MARYLAND

After two months of double-digit unemployment, Western Maryland's jobless rate dropped to 9.8 percent in March. Even so, Western Maryland had the highest unemployment of the state's four regions. Employment gains during March led to a drop of more than 1,500 on the regional unemployment rolls. Jobless rates dropped back by more than a full percentage point in each of the western region's member counties. In both Allegany and Garrett counties, employment gains, coupled with declines in the labor force, resulted in unemployment reductions. Western Maryland's industry payrolls moved up by 900 jobs during March, with hiring reported in all industry lines with the exception of manufacturing. Hiring activity was strongest in construction while, in government, payrolls rose in response to continuing recall activity.

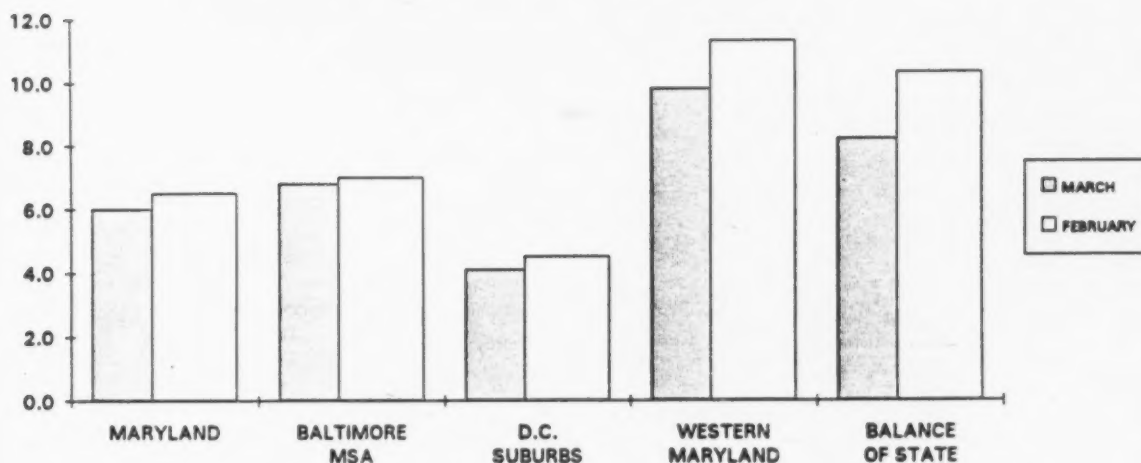
BALANCE OF STATE

Labor market conditions improved considerably on the Eastern Shore and in Southern Maryland. With an increase of slightly more than 4,800 in the number of jobholders, unemployment volume dropped back by 4,267 and the unemployment rate declined from 10.3 percent to 8.2 percent. All jurisdictions reported declining joblessness, with local unemployment rates ranging from 5.3 percent in Talbot to 13.4 percent in Somerset. Double-digit jobless rates continued to plague Dorchester and Worcester counties. In Cecil, while layoffs in Delaware's auto industry continued to affect local residents, unemployment declined nonetheless from 13.7 percent to 8.8 percent. A large portion of Cecil's jobless decline, however, was attributable to a reduction in the local labor force. Activity on the region's industrial payrolls reflected the seasonality of the shore's economy, with gains in eating and drinking places and hotels signaling a gradual pick-up in tourism-related businesses.

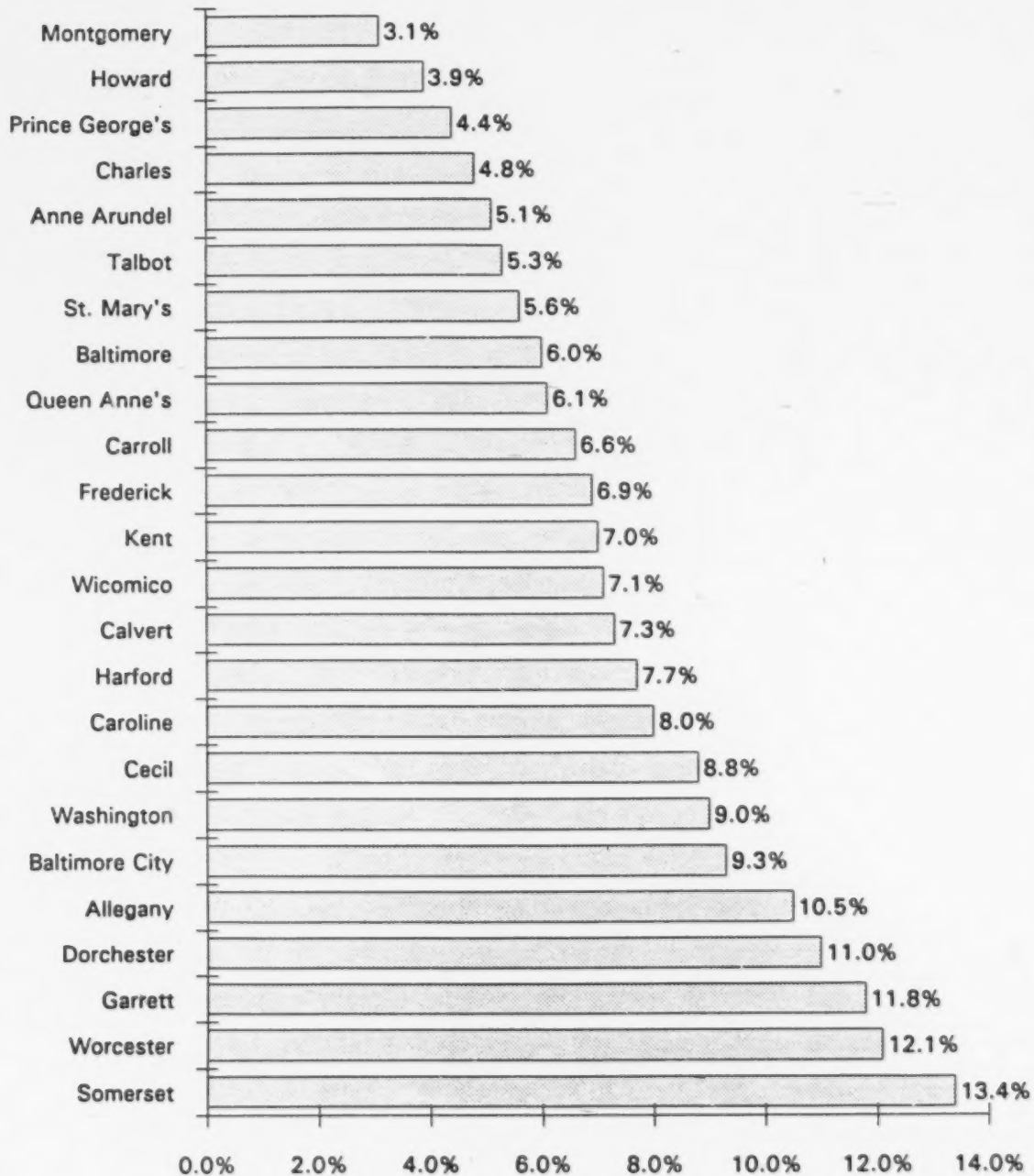
TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

	MARCH 1991		FEBRUARY 1991	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	149,899	6.0	160,799	6.5
BALTIMORE METROPOLITAN AREA	81,434	6.8	83,263	7.0
MARYLAND'S D.C. SUBURBS	40,828	4.1	44,092	4.5
WESTERN MARYLAND	10,576	9.8	12,114	11.3
BALANCE OF STATE	17,062	8.2	21,329	10.3

UNEMPLOYMENT RATES - MARCH 1991



LOCAL UNEMPLOYMENT RATES-MARCH 1991



NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT **(IN THOUSANDS)**

BY REGION--MARCH 1991

Industry	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	March 1991	February 1991	March 1991	February 1991	March 1991	February 1991	March 1991	February 1991
Total Nonagricultural Employment	1,142.1	1,134.3	776.0	770.8	92.5	91.6	138.3	136.2
Goods Producing	194.4	194.4	99.4	98.8	21.7	21.5	32.3	31.9
Mining	0.5	0.5	0.5	0.5	0.7	0.7	0.2	0.2
Construction	69.1	67.5	63.4	62.3	5.5	5.2	9.5	9.0
Manufacturing	124.8	126.4	35.5	36.0	15.5	15.6	22.6	22.7
Durable Goods	68.7	70.3	17.7	18.2	7.0	7.1	8.7	8.8
Nondurable Goods	56.1	56.1	17.8	17.8	8.5	8.5	13.9	13.9
Service Producing	947.7	939.9	676.6	672.0	70.8	70.1	106.0	104.3
Transportation & Public Utilities	55.7	54.9	33.7	33.4	3.1	5.0	7.2	7.3
Trade	263.5	260.9	196.0	195.3	26.0	25.9	33.9	33.0
Wholesale Trade	62.9	62.5	35.5	35.5	5.0	5.0	5.1	5.0
Retail Trade	200.6	198.4	160.5	159.8	21.0	20.9	28.8	28.0
Finance, Insurance, & Real Estate	75.7	75.6	45.9	46.1	3.2	3.1	5.0	4.9
Services	333.8	330.0	235.7	232.7	21.4	21.3	33.1	32.5
Total Government	219.0	218.5	165.3	164.5	15.1	14.8	26.8	26.6
Federal	50.7	50.6	72.7	72.8	1.8	1.8	6.8	6.8
State	73.6	72.7	18.0	17.8	4.9	4.7	5.8	5.8
Local	94.7	95.2	74.6	73.9	8.4	8.3	14.2	14.0

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	March 1991	February 1991	March 1990
Initial Claims	26,579	30,622	15,610
Weeks Claimed	346,326	334,233	167,018
First Payments	14,309	22,874	7,598
Final Payments	2,977	3,084	1,645
Weeks Paid	273,466	281,939	152,449
Net Benefit Amount	\$48,929,866	\$50,486,685	\$20,824,270
Average Check Amount	\$178.92	\$179.07	\$136.60

After peaking at about 52,000 in January, the number of initial claims processed at local unemployment offices fell for the second consecutive month, dropping by 13.2 percent to 26,579 in March. Even with this decline, initial claims reports are considerably higher than last year's count of 15,610. At the same time, the movement in weeks claimed broke away from normal seasonal patterns by rising during March. An over the month increase of 12,093 raised March's weeks claimed count to 346,326. About 79.0 percent, or 273,466, of all weekly claims for compensation resulted in payments, down from 84.4 percent in February and substantially below last March's payment ratio of 91.3 percent. Regionally, weekly payments subsided in each of Maryland's four areas, with the largest decline, of about 13.8 percent or 3,815, occurring in the tri-county Western Region.

Just over 5.0 percent of all claims paid during March represented first payments while 1.1 percent of all weeks compensated were received by claimants exhausting their benefits. In all, about 2,977 final benefit checks were issued during March, more than 50.0 percent of which were distributed to filers in the Baltimore Metro Area. Within the BMA, Baltimore City showed the largest number of exhaustions.

Statewide, the average check amount declined slightly from \$179.07 in February to \$178.92 in March. This decline, coupled with a drop of 8,473 in the number of weeks paid, reduced the overall benefit outlay during March by just over 3.0 percent to about \$48.9 million. Weekly benefit amounts declined in all regions of the state with the exception of Western Maryland where unemployed workers received payments of \$165.63 in March, up from February's average of \$163.70. Locally, average weekly check amounts ranged from a low of \$120.81 paid to claimants at the Crisfield office to a high of \$195.26 paid to those filing at the Ellicott City local office.

 **Maryland**
Department of Economic &
Employment Development
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
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LABOR MARKET DIMENSIONS

APRIL, 1991

**Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201**

**William Donald Schaefer, Governor
J. Randall Evans, Secretary**

LABOR FORCE DEVELOPMENTS

During April, Maryland's unemployment rate dropped below the 6.0 percent mark for the first time in four months, suggesting that the recession may very well be losing momentum. As employment rose, the jobless count declined, lowering the statewide jobless rate from 6.0 percent in March to 5.6 percent in April. Labor market conditions improved throughout the state, with twenty-one of Maryland's local jurisdictions reporting jobless declines.

Nationally, the unemployment rate, while declining by a greater 0.6 percentage points to 6.5 percent, remained well above the statewide estimate during April.

Employment among Maryland residents rose by just over 30,200 to 2,392,667 in April. While there are fewer persons employed this year than there were in April 1990, the current employment increase is the highest on record for the month since 1986. April's employment gain far exceeded the expansion in the labor force, resulting in a decline of nearly 8,000 in the number of unemployed workers over the month. This unemployment decline, coupled with reports of reduced claims activity at local unemployment offices, further suggests that the effects of the recession are subsiding.

	April 1991	March 1991	April 1990
Civilian Labor Force	2,534,351	2,512,124	2,520,365
Total Employment	2,392,667	2,362,455	2,430,045
Total Unemployment	141,684	149,669	90,320
Unemployment Rate	5.6	6.0	3.6
National Unemployment Rate	6.5	7.1	5.2

While activity in Maryland's job market during March and April has upgraded the status of many workers by raising employment by nearly 62,800 and reducing unemployment by just over 19,100, the deterioration wreaked by the recession is far from repaired. April's jobless rate, while improved, is still substantially higher than last year's rate of 3.6 percent when a much smaller 90,320 persons were unemployed and a greater 2,430,045 persons were employed.

INDUSTRY DEVELOPMENTS

Seasonal employment patterns prevailed during April. With the exception of finance and government, employment levels rose in all industry lines. About 9,100 jobs were added to Maryland's industry payrolls during April, raising employment to 2,160,700. Although substantial in light of recent economic conditions, this increase in jobs fell short of anticipated expansion. Last April, the seasonal upswing in employment lifted industry payrolls by about 13,800 jobs. As has been the case in recent months, the current job count remains nearly 14,000 below last year's level.

About 45.0 percent of April's job gains resulted from hiring activity in the goods-producing industries. The construction industry continued to recoup some of its recessionary losses, adding another 3,500 jobs over the month. General building contractors, still faced with a sluggish market, pulled the reins on their normal hiring practices, adding a mere 400 jobs during April. Hiring in special trades and among heavy contractors, however, uplifted the industry's performance with a combined increase of about 3,100 jobs over the month.

Employment in Maryland's factories rose by about 400 jobs during April, reversing a six month string of job declines. Growth in the manufacturing sector was confined solely to the durable goods component, with hiring and recall activity in stone products and primary metals supporting this gain. Those workers employed in the manufacturing industry found themselves working slightly shorter workweeks and earning smaller paychecks during April. Overall, in manufacturing, a reduction in overtime hours cut work schedules to 40.2 hours and lowered weekly earnings by about \$2.00 to \$473.56 in April. In durable goods, while workweeks remained the same, a drop in hourly earnings brought weekly earnings down by \$1.67 to \$519.99. Within durable goods, trends were mixed. The most noteworthy movement occurred in instruments manufacturing where work schedules were reduced by nearly 1.5 hours and weekly earnings dropped sharply, by \$27.51, to \$564.90. In nondurable goods, working an average of 38.8 hours yielded a weekly paycheck of \$432.62 in April, down from March's 39.0 hour paycheck of \$435.24. In printing and publishing where the average workweek fell by just over 1.0 hour to 36.4 hours, weekly earnings tumbled down by more than \$16.00 to \$482.30. Even with this decline, workers in print shops are earning about \$.50 more per hour this year than they did in April 1990.

Among Maryland's service providers, trade and services turned in the best performances. In trade, seasonal hiring in restaurants and at building supply/hardware stores helped to compensate for declines at general merchandise, home furnishings and food stores. The services industry, which contributed about 25.0 percent of all new jobs during April, reported payroll additions in agricultural services, hotels, amusements and business services. Elsewhere on industry payrolls, hiring was noted in communications, water transportation and real estate. On the flip side, layoffs were reported by depository institutions, insurance carriers, engineering services and at federal defense installations. Payrolls in local government also tumbled as elementary and secondary schools began their spring vacations.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
APRIL 1991

Industry	April 1991	March 1991	April 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,160.7	2,151.6	2,174.6
Goods Producing	355.4	351.3	369.9
Mining	2.2	2.0	2.1
Construction	154.1	150.6	161.0
Heavy Construction	18.7	17.4	19.4
Manufacturing	199.1	198.7	206.8
Durable Goods	103.2	102.6	110.4
Lumber & Wood Products	4.0	3.9	4.1
Stone, Clay, & Glass Products	8.4	8.0	8.7
Concrete, Gypsum, Plaster	5.2	5.1	5.4
Other Stone, Clay, & Glass	3.2	2.9	3.3
Primary Metal Industries	10.4	10.1	10.8
Blast Furnaces	8.7	8.4	9.0
Fabricated Metal Products	9.8	9.8	9.8
Fabricated Structural Metal Products	4.1	4.1	4.2
Other Fabricated Metal Products	4.6	4.6	4.5
Industrial Machinery	15.8	15.8	16.8
Refrigeration & Service Mach.	2.2	2.2	2.4
Other Industrial Machinery & Equipment	9.4	9.4	9.7
Electronic Equipment	14.6	14.7	16.1
Communications Equipment	4.3	4.3	4.4
Electronic Component	3.6	3.7	4.2
Other Electronic Equipment	6.7	6.7	7.5
Transportation Equipment	12.3	12.5	14.1
Motor Vehicles	5.1	5.2	5.7
Other Transportation	2.7	2.7	3.4
Instruments & Related	22.3	22.2	24.4
Miscellaneous Manufacturing	2.7	2.7	2.7
Nondurable Goods	95.9	96.1	96.4
Food & Kindred Products	24.7	24.8	24.0
Meat Products	5.9	6.1	5.6
Beverages	4.2	4.2	4.3
Other Food & Kindred	9.8	9.8	9.6
Textile Mill, Apparel	9.8	9.8	10.1
Paper & Allied Products	9.6	9.6	9.4
Printing & Publishing	27.9	28.1	28.7
Chemicals and Allied Products	13.7	13.7	13.8
Rubber & Miscellaneous	8.2	8.1	8.3
Other Nondurable Goods	2.0	2.0	2.1

Industry	April 1991	March 1991	April 1990
Service Producing	1,805.3	1,800.3	1,804.7
Transportation & Public Utilities	101.8	101.6	101.5
Transportation	57.1	57.0	57.2
Railroad Transportation	4.4	4.4	4.7
Trucking & Warehousing	29.2	29.4	28.6
Communications & Utilities	44.7	44.6	44.3
Communications	28.3	28.2	28.1
Electric, Gas, Sanitary	16.4	16.4	16.2
Trade	522.2	517.5	526.9
Wholesale Trade	108.1	108.1	109.2
Retail Trade	414.1	409.4	417.7
Building Materials, Garden Supplies	18.0	17.0	18.0
General Merchandise	42.6	42.7	43.8
Food Stores	66.1	66.2	64.9
Eating & Drinking Places	132.8	129.0	133.5
Finance, Insurance, & Real Estate	130.3	130.7	131.3
Finance	56.9	57.2	58.8
Depository Institutions	41.9	42.1	43.0
Commercial Banks	27.0	27.1	27.8
Insurance	39.0	39.2	38.3
Insurance Carriers	25.9	26.1	25.2
Real Estate	34.4	34.3	34.2
Services	625.3	623.2	619.6
Business Services	134.1	133.2	135.0
Health Services	162.3	162.3	156.8
Hospitals	79.8	80.0	77.0
Legal Services	15.9	15.9	15.8
Educational Services	37.1	37.2	36.9
Private Colleges, Universities	19.5	19.6	19.2
Total Government	425.7	427.3	425.4
Total Federal Government	132.1	132.5	134.8
Department of Defense	47.0	47.4	46.8
Other Federal Government	85.1	85.1	88.0
Total State & Local Government	293.6	294.8	290.6
Total State Government	101.1	101.3	99.8
State Education	34.8	34.8	33.2
Other State Government	66.3	66.5	66.6
Total Local Government	192.5	193.5	190.8
Local Education	116.5	118.0	116.1
Other Local Government	76.0	75.5	74.7

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES

APRIL 1991

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	April 1991	March 1991	April 1991	March 1991	April 1991	March 1991
MARYLAND						
Manufacturing					\$11.78	\$11.80
Durable Goods	40.2	40.3	\$473.56	\$475.54	12.44	12.48
Lumber and Wood Products	41.8	41.8	519.99	521.66	8.98	8.90
Stone, Clay, and Glass Products	38.8	38.7	348.42	344.43	11.29	11.38
Primary Metal Industries	44.0	42.8	496.76	487.06	16.28	16.31
Blast Furnaces	41.2	42.1	670.74	686.65	16.50	16.60
Fabricated Metals	41.5	42.5	684.75	705.50	10.61	10.48
Industrial Machinery	40.5	40.7	429.71	426.54	12.88	12.93
Electronic Equipment	42.3	42.7	544.82	552.11	9.27	9.52
Transportation Equipment	45.5	46.2	421.79	439.82	16.04	15.97
Instruments and Related Products	39.8	38.6	638.39	616.44	13.45	13.65
Miscellaneous Manufacturing Industries	42.0	43.4	564.90	592.41	9.60	9.55
	40.0	39.1	384.00	373.41		
Nondurable Goods	38.8	39.0	432.62	435.24	11.15	11.16
Food and Kindred Products	39.1	39.1	407.42	404.29	10.42	10.34
Textile Mill, Apparel	35.1	34.8	265.36	264.48	7.56	7.60
Paper and Allied Products	42.0	41.8	504.00	495.33	12.00	11.85
Printing and Publishing	36.4	37.5	482.30	498.75	13.25	13.30
Chemicals and Allied Products	41.3	41.2	520.38	517.06	12.60	12.55
Rubber and Plastic Products	42.0	42.5	411.60	422.88	9.80	9.95
BALTIMORE METROPOLITAN AREA						
Manufacturing					\$12.23	\$12.22
Durable Goods	40.8	40.7	\$498.98	\$497.35	13.15	13.12
Nondurable Goods	41.9	41.7	550.99	547.10	11.25	11.29
	39.6	39.7	445.50	448.21		

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

The Baltimore Metro Area hosted over 80.0 percent of the statewide jobless decline during April. With nearly 6,700 fewer workers counted among the unemployed, the jobless rate in the region tumbled by 0.6 percentage points to 6.2 percent. Employment rose and unemployment declined in each of the region's local jurisdictions. In both Carroll and Queen Anne's counties, unemployment rates dropped by more than a full percentage point to 5.5 percent and 4.9 percent, respectively. Baltimore City's rate, while the highest in the region, declined from 9.3 percent to 8.6 percent as more than 2,200 workers moved from the unemployment to the employment rolls. Seasonal hiring added about 5,600 jobs to the BMA's industrial payrolls over the month. The construction and trade industries, when combined, accounted for nearly two-thirds of the overall industrial gain. In construction, heavy contractors turned in the best showing while, in trade, eating and drinking establishments were the primary job suppliers.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. Suburbs, a modest decline of 0.1 percentage points lowered the regional jobless rate to 4.0 percent in April. Unemployment declined throughout the region with the exception of Prince George's County where the jobless rate held steady at 4.4 percent. Labor market conditions in Calvert and Frederick, the suburban counties hardest hit by the recession, improved noticeably. While continuing to top the statewide average, the jobless rate in Calvert fell by 0.6 percentage points to 6.7 percent and, in Frederick, an even greater decline of 0.9 percentage points lowered unemployment to 6.0 percent. In Frederick, while rising employment was a key factor in reducing unemployment, a shrinkage in the labor force also contributed to the county's jobless decline. During April, renewed hiring in the construction industry provided the primary source of new job opportunities for area residents.

WESTERN MARYLAND

Western Maryland's job market moved ahead in April, easing the unemployment burden carried by area jobseekers. The region's jobless rate, which peaked at 13.1 percent in February, fell below 9.0 percent for the first time in six months. Unemployment in the western region, while remaining the highest in the state, improved considerably, dropping from 9.8 percent in March to 8.8 percent in April. Employment in the region rose by slightly more than 2,300 in April while unemployment declined by 935 persons. The benefit of this employment expansion was evident throughout the region, causing jobless rates to drop back in each of the western counties. The largest decline, from 11.7 percent to 10.5 percent, occurred in Garrett County. The region's industrial payrolls rose by about 900 jobs during April, with increased hiring reported by almost every industry line. The construction industry turned in the best performance, followed by manufacturing and government.

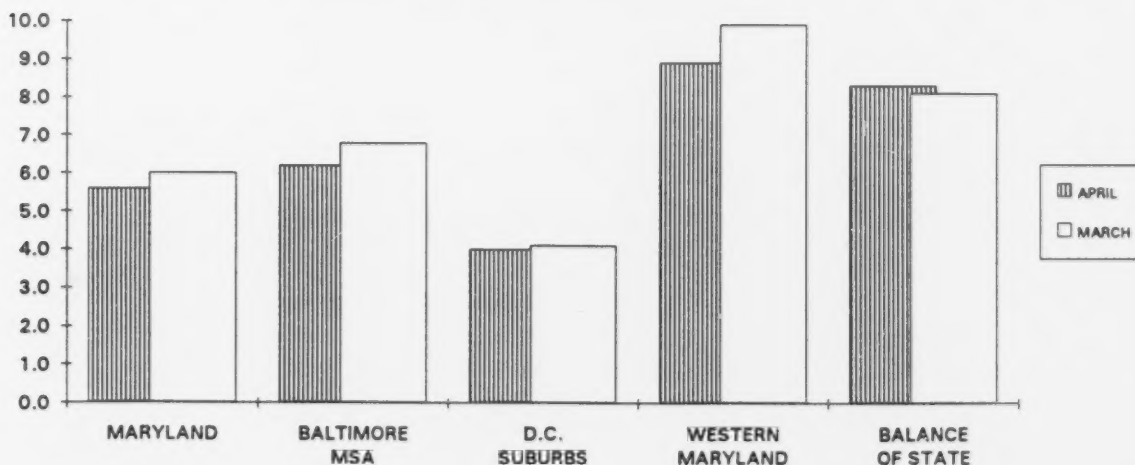
BALANCE OF STATE

On the Eastern Shore and in Southern Maryland, jobless increases in Cecil and Wicomico counties pushed the regional rate up from 8.1 percent to 8.3 percent. In Cecil, the only county in the region to show an absolute employment decline, continued layoffs in Delaware's auto industry increased the county's unemployment burden. The number of unemployed in the county rose by nearly 1,200 to 4,248 in April, causing the jobless rate to rise from 8.5 percent to 11.4 percent. In Wicomico, temporary layoffs in food processing were, in large part, responsible for pushing the county's jobless rate up by more than two full percentage points to 9.5 percent in April. Unemployment in Worcester County, on the other hand, dropped from 12.0 percent to 9.1 percent as employers began to rebuild their work forces in anticipation of the upcoming tourist season. Locally, unemployment rates in the region covered a broad range, spanning from a low of 4.6 percent in Talbot County to a high of 12.4 percent in Somerset.

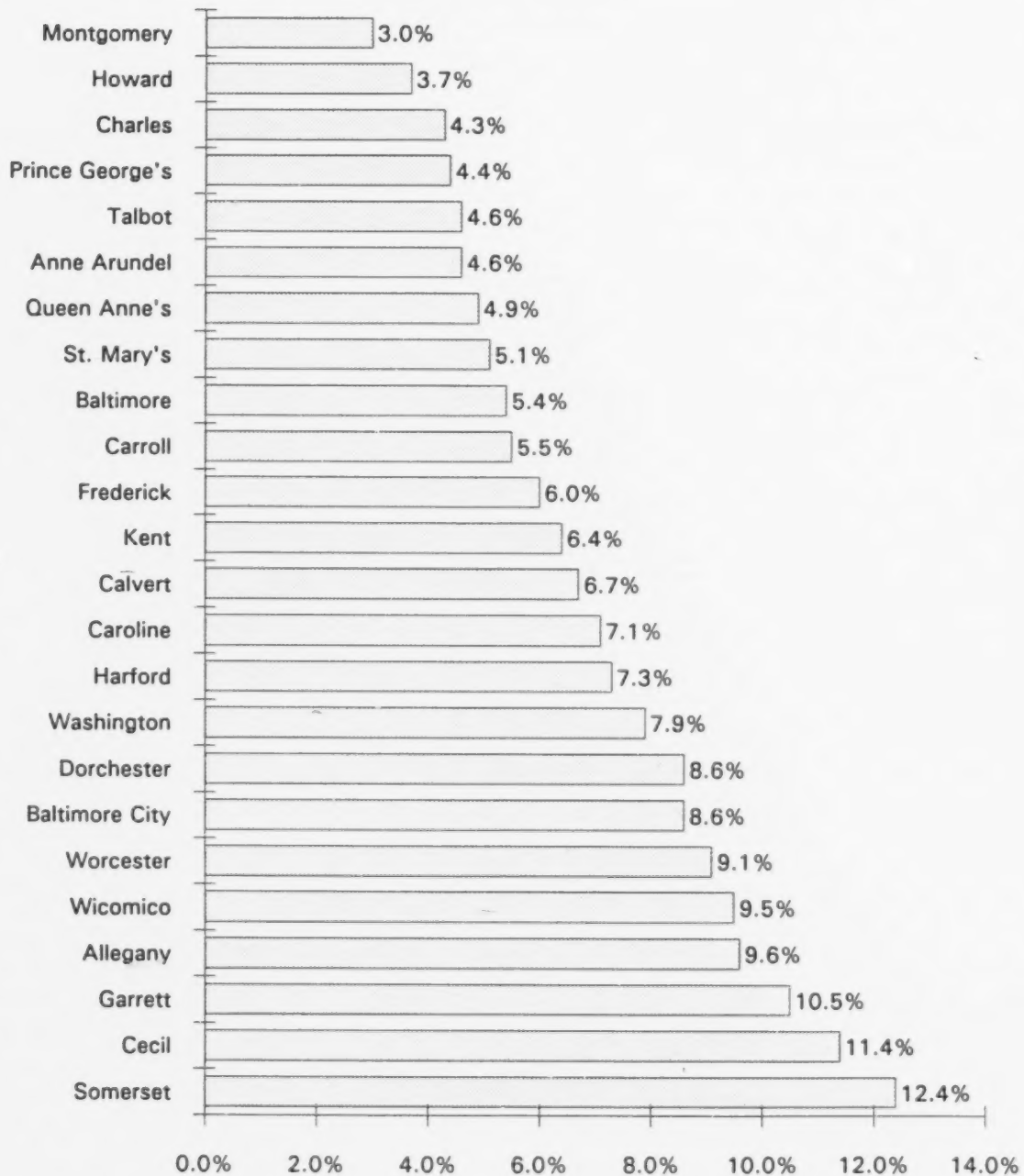
TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

	APRIL 1991		MARCH 1991	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	141,684	5.6	149,669	6.0
BALTIMORE METROPOLITAN AREA	74,818	6.2	81,491	6.8
MARYLAND'S D.C. SUBURBS	39,515	4.0	40,833	4.1
WESTERN MARYLAND	9,563	8.8	10,498	9.8
BALANCE OF STATE	17,788	8.3	16,846	8.1

UNEMPLOYMENT RATES - APRIL 1991



LOCAL UNEMPLOYMENT RATES-APRIL 1991



MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 NORTH EUTAW STREET
BALTIMORE, MARYLAND 21201

STATE OF MARYLAND CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT BY PLACE OF RESIDENCE APRIL 1991

AREA	CIVILIAN LABOR FORCE			EMPLOYMENT			UNEMPLOYMENT			UNEMPLOYMENT RATE		
	APRIL	MARCH*		APRIL	MARCH*		APRIL	MARCH*		APRIL	MARCH*	APR. 1990
MARYLAND	2,534,351	2,512,124		2,392,667	2,362,455		141,684	149,669		5.6	6.0	3.6
BALTIMORE METROPOLITAN AREA												
BALTIMORE CITY	1,215,370	1,205,913		1,140,552	1,124,422		74,818	81,491		6.2	6.8	3.9
ANNE ARUNDEL	346,187	343,946		316,412	311,937		29,775	32,009		8.6	9.3	6.1
BALTIMORE	215,975	213,979		206,029	203,116		9,946	10,863		4.6	5.1	2.5
CARROLL	393,609	390,447		372,470	367,203		21,139	23,244		5.4	6.0	3.5
HARFORD	63,953	63,786		60,449	59,594		3,504	4,192		5.5	6.6	2.4
HOWARD	85,430	84,623		79,223	78,102		6,207	6,521		7.3	7.7	3.7
QUEEN ANNE'S	94,183	93,138		90,720	89,437		3,463	3,701		3.7	4.0	1.9
	16,034	15,996		15,249	15,034		785	962		4.9	6.0	2.7
D. C. AREA												
CALVERT	996,339	990,011		956,824	949,178		39,515	40,833		4.0	4.1	2.5
CHARLES	23,824	23,775		22,217	22,040		1,607	1,735		6.7	7.3	3.2
FREDERICK	47,809	47,487		45,583	45,219		2,026	2,268		4.3	4.8	2.3
MONTGOMERY	78,302	78,442		73,637	73,049		4,665	5,393		6.0	6.9	3.0
PRINCE GEORGE'S	425,896	422,755		413,109	409,808		12,587	12,947		3.0	3.1	2.0
	420,908	417,553		402,278	399,063		18,630	18,490		4.4	4.4	3.0
WESTERN MARYLAND												
ALLEGANY	108,984	107,617		99,421	97,119		9,563	10,498		8.8	9.8	5.8
GARRETT	33,111	32,985		29,922	29,555		3,189	3,430		9.6	10.4	6.6
WASHINGTON	14,039	13,682		12,564	12,086		1,475	1,596		10.5	11.7	7.6
	61,834	60,950		56,935	55,478		4,899	5,472		7.9	9.0	5.0
BALANCE OF STATE												
CAROLINE	213,659	208,583		195,871	191,737		17,788	16,846		8.3	8.1	5.5
CECIL	14,362	14,124		13,342	12,990		1,020	1,134		7.1	8.0	4.0
DORCHESTER	37,163	36,188		32,915	33,120		4,248	3,068		11.4	8.5	6.1
KENT	17,448	17,573		15,939	15,655		1,509	1,918		8.6	10.9	6.5
ST. MARY'S	9,614	9,111		8,997	8,490		617	621		6.4	6.8	3.8
SOMERSET	43,145	42,763		40,929	40,360		2,216	2,403		5.1	5.6	4.0
TALBOT	13,000	12,672		11,382	10,977		1,618	1,695		12.4	13.4	12.7
WICOMICO	17,495	17,468		16,687	16,542		808	926		4.6	5.3	2.8
WORCESTER	41,008	39,805		37,120	36,989		3,888	2,816		9.5	7.1	5.3
	20,424	18,879		18,560	16,614		1,864	2,265		9.1	12.0	7.1
UNITED STATES**	124,727,000	124,443,000		116,678,000	115,639,000		8,049,000	8,804,000		6.5	7.1	5.2

* Estimates for the state are revised.

** Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
BY REGION--APRIL 1991

Industry	BALTIMORE		MARYLAND PORTION		WESTERN MARYLAND		BALANCE OF STATE	
	April 1991	March 1991	D.C. SUB JRBS	March 1991	April 1991	March 1991	April 1991	March 1991
Total Nonagricultural Employment	1,146.9	1,141.3	773.7	775.4	93.5	92.4	139.7	138.2
Goods Producing	197.4	195.5	100.2	99.2	22.0	21.4	32.5	32.3
Mining	0.5	0.5	0.6	0.5	0.8	0.7	0.2	0.2
Construction	72.0	69.9	64.1	62.9	5.6	5.3	9.8	9.5
Manufacturing	124.9	125.1	35.5	35.8	15.6	15.4	22.5	22.6
Durable Goods	68.9	68.8	17.8	17.9	7.2	7.0	8.7	8.7
Nondurable Goods	56.0	56.3	17.7	17.9	8.4	8.4	13.8	13.9
Service Producing	949.5	945.8	673.5	676.2	71.5	71.0	107.2	105.9
Transportation & Public Utilities	55.8	55.5	33.9	33.9	5.2	5.1	7.1	7.3
Trade	264.6	263.0	196.3	196.2	26.2	26.1	34.6	33.9
Wholesale Trade	62.7	62.8	35.4	35.5	5.0	5.0	5.0	5.1
Retail Trade	201.9	200.2	160.9	160.7	21.2	21.1	29.6	28.8
Finance, Insurance, & Real Estate	75.3	75.3	45.6	45.7	3.2	3.2	5.0	5.0
Services	333.6	333.0	234.0	234.8	21.6	21.5	33.8	32.9
Total Government	220.2	219.0	163.7	165.6	15.3	15.1	26.7	26.8
Federal	50.5	50.5	72.8	72.9	1.8	1.8	6.8	6.8
State	74.0	73.7	17.8	18.0	5.0	4.9	5.8	5.8
Local	95.7	94.8	73.1	74.7	8.5	8.4	14.1	14.2

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	April 1991	March 1991	April 1990
Initial Claims	24,617	26,579	16,077
Weeks Claimed	367,224	346,326	155,631
First Payments	12,252	14,309	6,895
Final Payments	4,446	2,977	2,053
Weeks Paid	286,332	273,466	140,698
Net Benefit Amount	\$51,256,767	\$48,929,866	\$19,684,752
Average Check Amount	\$179.01	\$178.92	\$139.91

Initial claims filings continued to subside during April, falling by 1,962, or by 7.4 percent, from March's reports. Even with this decline, the current claims level is more than 50.0 percent higher than last April's tally, representing an over-the-year increase of slightly more than 8,500 in initial claims filings. While the count of initial claims dropped, the number of weeks claimed rose up from 346,326 in March to 367,224 in April. About 78.0 percent of all weekly claims filed during April resulted in compensation, with payments averaging \$179.01, up slightly from March's check amount of \$178.92. During April, the payment of an estimated 286,332 weekly claims cost the Unemployment Insurance Trust Fund about \$51.3 million, up from \$48.9 million in March.

Meanwhile, the number of exhaustions, which has been steadily declining since January, shot up by almost 50.0 percent to number 4,446 in April. About 1.6 percent of all weeks paid during April represented final payments, up from March's ratio of 1.1 percent. While final pays increased, the number of first pays dropped back by 14.4 percent to 12,252 in April. Last year, the number of initial payments also declined over the month but by a lesser 9.3 percent. Regionally, the ratio of first pays to total weeks paid was highest in the Western Region while the local offices in the Baltimore Metro Area reported the highest percentage of final pays. For those claimants receiving benefits, weekly checks were highest in the D.C. suburbs and lowest in the Eastern Shore/Southern Maryland Region.

REGIONAL INDICATORS APRIL 1991

	BMA	DC Suburbs	Western Maryland	Balance of State
First Pays	6,391	2,742	1,261	1,092
Final Pays	2,293	976	303	475
Total Weeks Paid	149,306	64,725	23,127	29,415
Average Check Amount	\$181.09	\$188.49	\$167.15	\$149.46

 Maryland
Department of Economic &
Employment Development

OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
Baltimore, Maryland 21201



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Maryland
Department of Economic &
Employment Development

LABOR MARKET DIMENSIONS

MAY, 1991

**Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201**

**William Donald Schaefer, Governor
J. Randall Evans, Secretary**

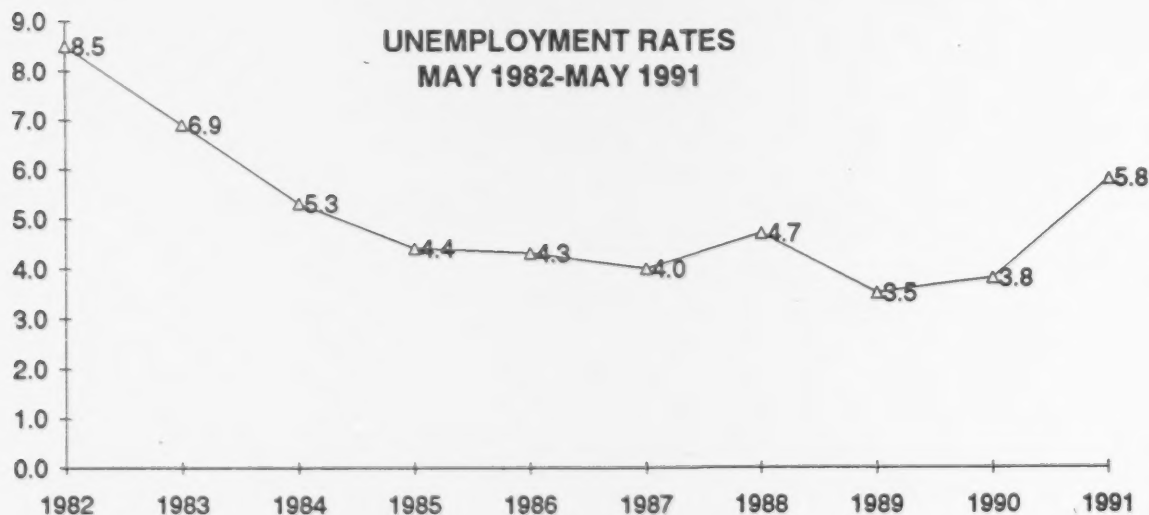
LABOR FORCE DEVELOPMENTS

Maryland's job market sent out mixed signals during May. While employment posted its fourth consecutive monthly gain, the benefit of this employment expansion was diminished by an even greater increase in the number of jobseekers entering the labor market. As a result, unemployment in Maryland inched up from 5.6 percent in April to 5.8 percent in May. The increase in Maryland's jobless estimate was indicative of the national trend which showed unemployment rising from 6.5 percent to 6.6 percent.

During May, nearly 9,000 jobseekers entered the labor market. At the same time, employment, while expanding, grew by just 2,323 persons. This lag in employment growth caused the unemployment count to expand by more than 6,600, raising total unemployment in the state to 148,278 in May.

	May 1991	April 1991	May 1990
Civilian Labor Force	2,543,207	2,534,223	2,542,669
Total Employment	2,394,929	2,392,606	2,445,877
Total Unemployment	148,278	141,617	96,792
Unemployment Rate	5.8	5.6	3.8
National Unemployment Rate	6.6	6.5	5.1

Unemployment increases are not uncommon when an economy is emerging from a recession. While current job market indicators point to a slower than normal growth in seasonal employment, the fact that employment has consistently grown evidences a strengthening in the economy. Employers, while proceeding cautiously in terms of hiring, are, nonetheless, moving in a positive direction. Recent national reports have shown signs that consumer spending is beginning to pick up, albeit slowly. This increase in consumer confidence bodes well for future economics in that it will help to stimulate business activity, providing employers with the impetus to rebuild their workforces.



INDUSTRY DEVELOPMENTS

Maryland's employment situation, as measured by nonagricultural payroll activity, continued to improve during May with job gains of about 12,100 raising total at place employment to 2,172,600. Employment, while expanding, still remained well below year ago levels, with all major industry lines contributing to this overall reduction. Last year, a monthly gain of nearly 17,000 moved the job count ahead to a much higher 2,191,500 in May.

Performance in the goods-producing sector during May was mixed. The outcome in this industrial component was, however, determined by a seasonal upswing in the construction industry. Employment gains of about 1,800 in construction cancelled out job losses in manufacturing, resulting in a net gain of about 1,500 jobs in the goods-producing sector during May. All phases of construction—heavy, general building, and special trade—reported increased hiring activity over the month. Special trade contractors were the largest job providers, accounting for over 50.0 percent of the overall industry gain. Meanwhile, in the state's manufacturing sector, a number of industries, both in durables and nondurables production, posted employment declines. Losses, however, were moderated by hiring activity in food processing and chemical products.

The status of production workers employed in Maryland's factories remained fairly stable in May. Hours worked dropped slightly, by 0.1 of an hour, but still remained above the 40 hour mark at 40.1. This reduction in work schedules caused a slight drop, of \$1.58, in weekly earnings, producing an average paycheck of \$472.78 in May. Within the durable goods component, a slightly larger drop in work hours, from 41.7 to 41.5, reduced weekly paychecks by about \$2.91 to \$516.26 over the month. In industrial machinery, changes were more pronounced. Reductions of more than 1.5 hours in overtime diminished paychecks by more than \$20.00 per week to \$516.17. On the upside, workers in transportation equipment saw their paychecks increase by nearly \$25.00 per week to \$663.77, owing to an increase in work schedules coupled with a hike of \$.38 in hourly pay rates. On the nondurables side, weekly hours and earnings measurements remained constant at 38.9 hours and \$434.90. Within nondurables, the largest change occurred in rubber products where workweeks rose by a full hour to 43.0 and weekly wages increased by just over \$14.00 to \$430.00.

Among the service-producing industries, seasonal expansion boosted employment by an estimated 10,600 jobs in May. Trade employment, leading the expansion, added just over 6,000 jobs during May. Slightly more than 80.0 percent of the growth in the trade sector emanated from hiring activity in local eating and drinking establishments. General merchandise and building/garden supply stores also showed signs of vitality, producing a combined total of 900 jobs through May.

A number of seasonal activities in the services industries picked up in May with the beginning of the summer tourist season. Hotels and motels began to increase their workforces, amusement establishments added jobs and agricultural services responded to the increased demand for lawn and gardening services. Hiring activity in these industries more than compensated for declines in personal, educational and health services. Elsewhere on industry payrolls, the job market in the finance, insurance, and real estate sector opened up somewhat with the addition of about 900 jobs during May. Hiring was noted throughout the industry with like gains of 400 reported by both the finance and real estate components.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
MAY 1991

Industry	May 1991	April 1991	May 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,172.6	2,160.5	2,191.5
Goods Producing	356.6	355.1	372.1
Mining	2.2	2.2	2.1
Construction	155.7	153.9	163.0
Heavy Construction	18.9	18.7	19.7
Manufacturing	198.7	199.0	207.0
Durable Goods	102.7	103.0	110.4
Lumber & Wood Products	4.0	4.0	4.2
Stone, Clay, & Glass Products	8.2	8.3	8.7
Concrete, Gypsum, Plaster	5.2	5.2	5.4
Other Stone, Clay, & Glass	3.0	3.1	3.3
Primary Metal Industries	10.4	10.4	10.7
Blast Furnaces	8.7	8.7	9.0
Fabricated Metal Products	9.8	9.8	9.9
Fabricated Structural Metal Products	4.1	4.1	4.3
Other Fabricated Metal Products	4.6	4.6	4.6
Industrial Machinery	15.8	15.8	16.8
Refrigeration & Service Mach.	2.2	2.2	2.4
Other Industrial Machinery & Equipment	9.4	9.4	9.7
Electronic Equipment	14.6	14.6	16.3
Communications Equipment	4.3	4.3	4.5
Electronic Component	3.6	3.6	4.2
Other Electronic Equipment	6.7	6.7	7.6
Transportation Equipment	12.2	12.3	13.9
Motor Vehicles	5.0	5.1	5.6
Other Transportation	2.7	2.7	3.3
Instruments & Related	22.1	22.2	24.3
Miscellaneous Manufacturing	2.7	2.7	2.7
Nondurable Goods	96.0	96.0	96.6
Food & Kindred Products	25.0	24.6	24.3
Meat Products	6.0	5.9	5.6
Beverages	4.3	4.2	4.3
Other Food & Kindred	9.8	9.7	9.7
Textile Mill, Apparel	9.8	9.9	10.0
Paper & Allied Products	9.6	9.7	9.4
Printing & Publishing	27.7	27.9	28.7
Chemicals and Allied Products	13.7	13.6	13.8
Rubber & Miscellaneous	8.2	8.3	8.4
Other Nondurable Goods	2.0	2.0	2.0

Industry	May 1991	April 1991	May 1990
Service Producing	1,816.0	1,805.4	1,819.4
Transportation & Public Utilities	101.6	101.8	102.2
Transportation	57.0	57.2	57.7
Railroad Transportation	4.5	4.5	4.8
Trucking & Warehousing	29.1	29.3	29.0
Communications & Utilities	44.6	44.6	44.5
Communications	28.1	28.2	28.2
Electric, Gas, Sanitary	16.5	16.4	16.3
Trade	528.1	522.0	533.2
Wholesale Trade	107.8	108.0	109.3
Retail Trade	420.3	414.0	423.9
Building Materials, Garden Supplies	18.5	18.0	18.5
General Merchandise	42.9	42.5	44.2
Food Stores	65.7	66.1	65.2
Eating & Drinking Places	137.7	132.8	137.9
Finance, Insurance, & Real Estate	131.1	130.2	132.2
Finance	57.3	56.9	58.9
Depository Institutions	42.2	41.9	43.2
Commercial Banks	27.3	26.9	27.9
Insurance	39.0	38.9	38.4
Insurance Carriers	25.8	25.8	25.3
Real Estate	34.8	34.4	34.9
Services	626.8	625.0	623.1
Business Services	134.4	134.2	135.3
Health Services	161.9	162.2	157.4
Hospitals	79.8	79.8	77.2
Legal Services	16.0	15.9	15.9
Educational Services	36.3	37.0	36.2
Private Colleges, Universities	18.6	19.4	18.5
Total Government	428.4	426.4	428.7
Total Federal Government	133.3	132.7	138.1
Department of Defense	47.8	47.5	46.7
Other Federal Government	85.5	85.2	91.4
Total State & Local Government	295.1	293.7	290.6
Total State Government	100.5	101.0	97.8
State Education	34.3	34.7	31.5
Other State Government	66.2	66.3	66.3
Total Local Government	194.6	192.7	192.8
Local Education	118.9	116.8	117.0
Other Local Government	75.7	75.9	75.8

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES

MAY 1991

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	May 1991	April 1991	May 1991	April 1991	May 1991	April 1991
MARYLAND						
Manufacturing					\$11.79	\$11.80
Durable Goods	40.1	40.2	\$472.78	\$474.36	12.44	12.45
Lumber and Wood Products	41.5	41.7	516.26	519.17	8.85	9.01
Stone, Clay, and Glass Products	39.2	38.9	346.92	350.49	11.38	11.32
Primary Metal Industries	44.1	44.3	501.86	501.48	16.25	16.27
Blast Furnaces	41.1	41.1	667.88	668.70	16.45	16.50
Fabricated Metals	41.2	41.3	677.74	681.45	10.58	10.67
Industrial Machinery	40.9	40.6	432.72	433.20	12.84	12.81
Electronic Equipment	40.2	41.9	516.17	536.74	9.12	9.36
Transportation Equipment	45.0	45.7	410.40	427.75	16.43	16.05
Instruments and Related Products	40.4	39.8	663.77	638.79	13.45	13.55
Miscellaneous Manufacturing Industries	41.3	41.7	555.49	565.04	9.75	9.60
	40.6	40.1	395.85	384.96		
Nondurable Goods	38.9	38.9	434.90	434.90	11.18	11.18
Food and Kindred Products	39.1	39.2	405.47	408.46	10.37	10.42
Textile Mill, Apparel	35.7	35.1	270.61	263.95	7.58	7.52
Paper and Allied Products	42.4	42.0	499.47	499.80	11.78	11.90
Printing and Publishing	36.0	36.5	486.00	490.93	13.50	13.45
Chemicals and Allied Products	40.7	41.3	514.86	517.90	12.65	12.54
Rubber and Plastic Products	43.0	42.0	430.00	415.80	10.00	9.90
BALTIMORE METROPOLITAN AREA						
Manufacturing	40.8	40.8	\$505.92	\$501.43	\$12.40	\$12.29
Durable Goods	41.7	41.8	555.03	549.25	13.31	13.14
Nondurable Goods	39.8	39.7	455.71	452.58	11.45	11.40

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

In the Baltimore Metro Area, the only region in the state to experience an employment decline, the number of unemployed workers rose by nearly 5,100 to reach 79,868 in May. With this increase, the regional jobless rate escalated from 6.2 percent to 6.6 percent. Layoffs in health services and manufacturing, coupled with semester break reductions at private colleges and universities, contributed to rising joblessness in a number of local jurisdictions. The unemployment impact fell disproportionately upon Baltimore City residents where an increase of nearly 3,400 in the jobless numbers pushed local unemployment up by nearly a full percentage point to 9.5 percent in May. Aside from the normal layoff activity associated with seasonal economics, Baltimore City's jobless statistics reacted to the closing of a local health care facility. Meanwhile, in Carroll, Harford, and Queen Anne's counties, unemployment rates declined through May as workers opted to leave the job market.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. Suburbs, more than 4,700 jobseekers entered the labor force during May. Employment, while expanding, grew at a rate considerably below that of the labor force, causing the unemployment count to rise by about 4,000 and the jobless rate to advance from 4.0 percent in April to 4.4 percent in May. Last year, joblessness in the region, although much lower at 2.9 percent, rose by a like 0.4 percentage points. All of the area's local jurisdictions, with the exception of Frederick County where labor market conditions remained relatively stable, contributed to the regional unemployment upturn. In Prince George's County, layoffs in educational services, real estate and business services prompted unemployment to rise to an eight year high of 5.0 percent in May. Calvert County's rate, the highest in the region, rose to 7.2 percent, with layoffs reported in food stores fueling this increase.

WESTERN MARYLAND

Western Maryland's job market remained on a relatively even keel during May, with the jobless rate holding steady at 8.7 percent. During May, the regional labor force expanded by an estimated 460 jobseekers to reach its highest level since the summer of 1990. Growth in employment accommodated about 90.0 percent of this labor force increase. While the region's unemployment count did rise by about 55 people, this increase was not substantial enough to alter May's jobless rate. Locally, unemployment trends were mixed. The jobless rate in Allegany held at 9.6 percent while, in Garrett, increased hiring activity lowered unemployment from 10.4 percent to 9.7 percent. In Washington County, a different scenario unfolded as manufacturing layoffs added workers to the jobless rolls, increasing the unemployment rate slightly from 7.9 percent to 8.1 percent.

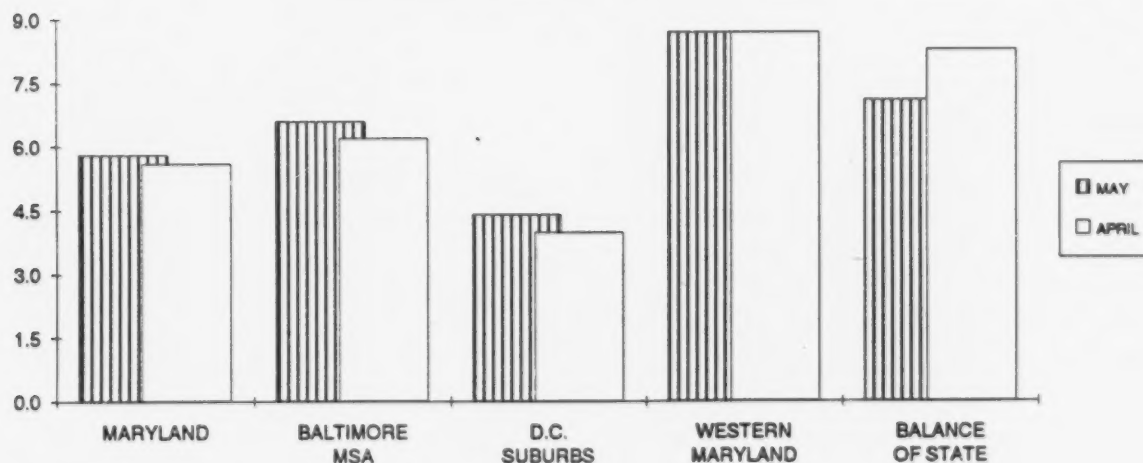
BALANCE OF STATE

In the Eastern Shore and Southern Maryland region, a moderate growth in employment, coupled with a slower than normal increase in the labor force, helped to lower joblessness in the area by more than a full percentage point to 7.1 percent in May. Seven of the nine counties within the region reported unemployment declines over the month, however, increasing employment was a contributing factor in lowering jobless rates in just four of these counties. In those counties where hiring did occur, seasonal recalls in food processing helped to reduce unemployment rates as did other seasonal hiring at eating and drinking establishments, in amusements and at hotels. The largest jobless decline attributable to employment expansion occurred in Worcester County where an employment gain of nearly 2,300 was more than enough to accommodate the influx of jobseekers and, at the same time, to reduce joblessness from 9.1 percent to 6.5 percent. Locally, unemployment rates in the region ranged from a low of 4.9 percent in Talbot County to a high of 11.1 percent in Somerset.

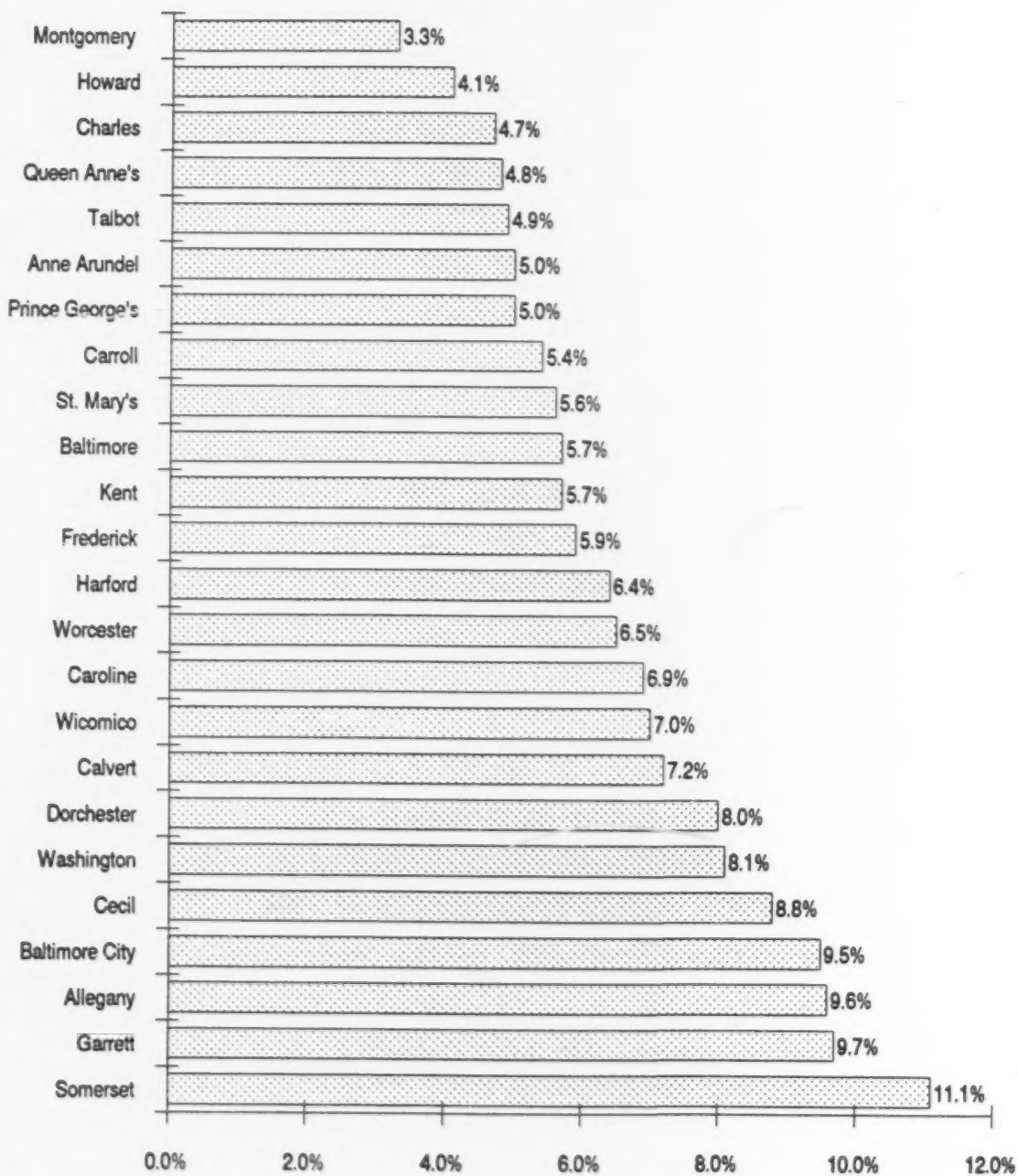
TOTAL UNEMPLOYMENT-MARYLAND AND REGIONS

	MAY 1991		APRIL 1991	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	148,278	5.8	141,617	5.6
BALTIMORE METROPOLITAN AREA	79,868	6.6	74,786	6.2
MARYLAND'S D.C. SUBURBS	43,687	4.4	39,644	4.0
WESTERN MARYLAND	9,556	8.7	9,501	8.7
BALANCE OF STATE	15,164	7.1	17,684	8.3

UNEMPLOYMENT RATES - MAY 1991



LOCAL UNEMPLOYMENT RATES-MAY 1991



STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE
MAY 1991

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	MAY	APRIL*	MAY	APRIL*	MAY	APRIL*	MAY	APRIL*	MAY 1990
MARYLAND	2,543,207	2,534,223	2,394,929	2,392,606	148,278	141,617	5.8	5.6	3.8
BALTIMORE METROPOLITAN AREA	1,217,808	1,214,209	1,137,940	1,139,423	79,868	74,786	6.6	6.2	4.1
BALTIMORE CITY	348,841	345,854	315,687	316,099	33,154	29,755	9.5	8.6	6.5
ANNE ARUNDEL	216,343	215,777	205,557	205,825	10,786	9,952	5.0	4.6	2.8
BALTIMORE	394,048	393,226	371,617	372,101	22,431	21,125	5.7	5.4	3.7
CARROLL	63,734	63,894	60,311	60,389	3,423	3,505	5.4	5.5	2.6
HARFORD	84,435	85,336	79,041	79,144	5,394	6,192	6.4	7.3	3.9
HOWARD	94,419	94,104	90,512	90,630	3,907	3,474	4.1	3.7	1.9
QUEEN ANNE'S	15,988	16,017	15,214	15,234	774	783	4.8	4.9	2.6
D. C. AREA	1,002,169	997,423	958,482	957,779	43,687	39,644	4.4	4.0	2.9
CALVERT	23,981	23,844	22,256	22,240	1,725	1,604	7.2	6.7	3.5
CHARLES	47,927	47,651	45,662	45,629	2,265	2,022	4.7	4.2	2.5
FREDERICK	78,389	78,388	73,765	73,711	4,624	4,677	5.9	6.0	3.1
MONTGOMERY	427,847	426,187	413,825	413,521	14,022	12,666	3.3	3.0	2.3
PRINCE GEORGE'S	424,028	421,353	402,975	402,679	21,053	18,674	5.0	4.4	3.4
WESTERN MARYLAND	109,256	108,796	99,700	99,295	9,556	9,501	8.7	8.7	5.8
ALLEGANY	33,324	33,032	30,136	29,882	3,188	3,170	9.6	9.6	7.2
GARRETT	14,110	14,011	12,743	12,554	1,367	1,457	9.7	10.4	6.8
WASHINGTON	61,822	61,753	56,821	56,879	5,001	4,874	8.1	7.9	4.7
BALANCE OF STATE	213,970	213,795	198,806	196,111	15,164	17,684	7.1	8.3	5.3
CAROLINE	14,468	14,381	13,476	13,364	992	1,017	6.9	7.1	3.8
CECIL	36,862	37,110	33,612	32,946	3,250	4,164	8.8	11.2	6.2
DORCHESTER	17,066	17,468	15,894	15,962	1,372	1,506	8.0	8.6	6.2
KENT	9,527	9,620	8,985	9,012	542	608	5.7	6.3	4.2
ST. MARY'S	43,348	43,196	40,899	40,988	2,449	2,208	5.6	5.1	3.5
SOMERSET	13,390	12,973	11,905	11,355	1,485	1,618	11.1	12.5	11.4
TALBOT	17,354	17,526	16,503	16,718	851	808	4.9	4.6	3.9
WICOMICO	39,644	41,069	36,861	37,172	2,783	3,897	7.0	9.5	5.4
WORCESTER	22,311	20,452	20,871	18,594	1,440	1,858	6.5	9.1	5.5
UNITED STATES**	124,857,000	124,727,000	116,624,000	116,678,000	8,233,000	8,049,000	6.6	6.5	5.1

*Estimates for the state are revised.

**Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
BY REGION--MAY 1991

Industry	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	May 1991	April 1991	May 1991	April 1991	May 1991	April 1991	May 1991	April 1991
Total Nonagricultural Employment	1,147.9	1,145.4	778.9	774.6	94.0	93.4	143.8	139.9
Goods Producing	197.5	197.7	101.1	100.2	21.8	22.0	33.3	32.6
Mining	0.5	0.5	0.6	0.6	0.8	0.8	0.2	0.2
Construction	72.5	71.7	65.1	64.0	5.5	5.6	10.2	9.8
Manufacturing	124.5	125.5	35.4	35.6	15.5	15.6	22.9	22.6
Durable Goods	68.7	69.2	17.7	17.8	7.1	7.2	8.7	8.7
Nondurable Goods	55.8	55.3	17.7	17.8	8.4	8.4	14.2	13.9
Service Producing	950.4	947.7	677.8	674.4	72.2	71.4	110.5	107.3
Transportation & Public Utilities	55.9	55.9	33.9	33.9	5.3	5.2	7.3	7.2
Trade	265.5	263.5	197.2	196.3	26.4	26.2	36.3	34.6
Wholesale Trade	62.6	62.7	35.1	35.4	5.0	5.0	5.1	5.0
Retail Trade	203.9	200.8	162.1	160.9	21.4	21.2	31.2	29.6
Finance, Insurance, & Real Estate	75.2	75.0	45.8	45.6	3.2	3.2	5.1	5.0
Services	332.7	333.4	235.0	234.7	21.7	21.5	35.0	34.0
Total Government	220.1	219.9	165.9	163.9	15.6	15.3	26.8	26.5
Federal	51.0	50.6	73.7	73.0	1.8	1.8	6.9	6.8
State	74.1	74.0	17.7	17.8	5.2	5.0	5.3	5.6
Local	95.0	95.3	74.5	73.1	8.6	8.5	14.6	14.1

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	May 1991	April 1991	May 1990
Initial Claims	26,257	24,617	19,133
Weeks Claimed	298,313	367,224	155,309
First Payments	10,723	12,252	6,971
Final Payments	4,444	4,446	2,164
Weeks Paid	239,064	286,332	138,817
Net Benefit Amount	\$42,698,415	\$51,256,767	\$19,432,655
Average Check Amount	\$178.61	\$179.01	\$139.99

Following three months of consecutive declines, the number of initial claims increased by 6.7 percent to reach 26,257 in May. Last year, the initial claims count, while substantially lower at 19,133, increased by a much greater 19.0 percent over the month. While initial claims rose, the numbers of both weeks claimed and weeks paid declined over the month. A drop of about 18.8 percent in the number of weeks claimed lowered May's count to 298,313. Meanwhile, the number of weeks paid dropped back by nearly 47,300 to 239,064, reducing the net benefit outlay through May by about \$8.5 million. About 80.0 percent of all weekly claims filed during May resulted in compensation, with payments averaging about \$178.61, down slightly from April's weekly benefit check of \$179.01. Nearly 4.5 percent of all checks paid during May represented first pays while 1.9 percent accounted for final payments, up from April's corresponding payment ratios of 4.3 percent and 1.5 percent, respectively.

REGIONAL INDICATORS MAY 1991

	BMA	DC Suburbs	Western Maryland	Balance of State
First Pays	5,649	2,567	877	790
Final Pays	2,337	995	349	358
Weeks Paid	123,285	56,108	19,110	21,885
Average Check Amount	\$179.94	\$187.93	\$165.11	\$148.57

Weekly payments declined in each of the state's four regions during May, with the largest decline, of about 26.0 percent, occurring in the Balance of State area. Within the region, payment activity dropped off in each of the local offices, with reductions at the Snow Hill unemployment office accounting for about one-fourth of the overall regional decline. Reflecting the differences in pay scales in a rural setting as opposed to a metropolitan area, claimants filing in the Balance of State area were paid about \$40.00 less per week than those in the D.C. suburbs where checks averaged \$187.93 in May.

 **Maryland**
Department of Economic &
Employment Development
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
Baltimore, Maryland 21201



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LABOR MARKET DIMENSIONS

JUNE, 1991

Maryland Department of Economic and Employment Development

Office of Labor Market Analysis and Information

1100 North Eutaw Street

Baltimore, Maryland 21201

William Donald Schaefer, Governor

J. Randall Evans, Secretary

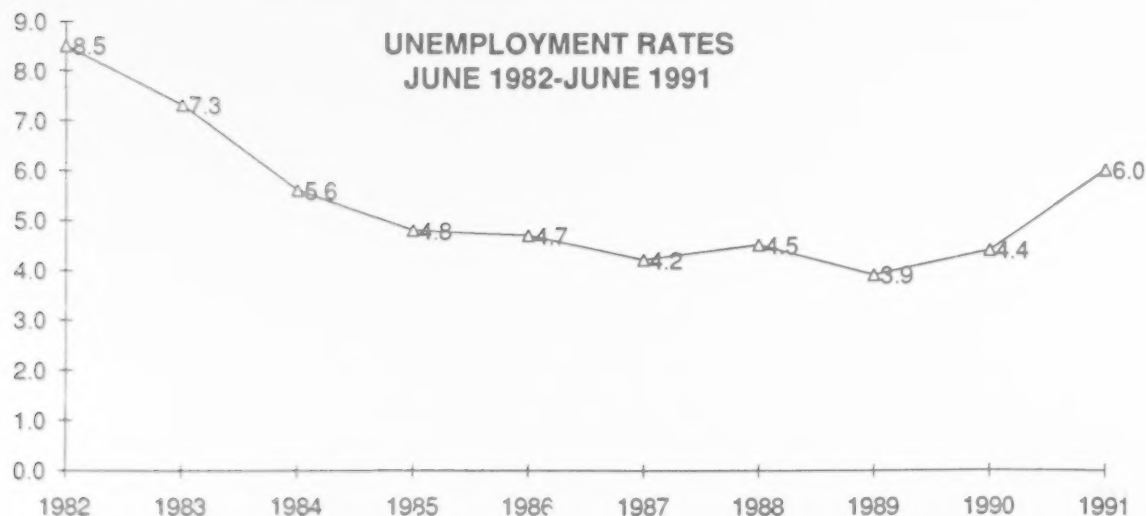
LABOR FORCE DEVELOPMENTS

Maryland's labor force expanded to 2,555,640 persons in June, up 12,630 from May, as new entrants and summer workers began looking for jobs. The sudden influx of workers boosted the unemployment rate to 6.0 percent, up from 5.8 percent. The number of jobless rose by 3,595 to 152,105, while at the same time employment was up 9,035 to 2,403,535 persons. Among local jurisdictions, unemployment ranged from a low of 3.4 percent in Montgomery County to a high of 10.4 percent in Garrett County.

The over-the-month increase in joblessness, though below average, was fairly typical, as unemployment normally rises in June. The modest increase, of just 0.2 percentage points, in this year's jobless rate is a positive indicator for Maryland's still-soft economy. The current jobless rate, however, remains significantly higher than last year's 4.4 percent. Unemployment has not been this high in June since 1983, when it was a much high 7.3 percent. Over the year, the labor force has contracted by more than 6,000 persons. About 44,000 fewer Marylanders hold jobs than a year ago, and nearly 38,000 more—increase of one-third—are now unemployed.

Maryland's job market continued to outperform the U.S. economy in June. Nationally, unemployment rose 0.3 percentage points to 6.9 percent, as the jobless ranks swelled by 541,000. The marks the sixth consecutive month that the state unemployment rate has been below the U.S. level.

	June 1991	May 1991	June 1990
Civilian Labor Force	2,555,640	2,543,010	2,561,954
Total Employment	2,403,535	2,394,500	2,448,064
Total Unemployment	152,105	148,510	113,890
Unemployment Rate	6.0	5.8	4.4
National Unemployment Rate	6.9	6.6	5.3



INDUSTRY DEVELOPMENTS

Maryland's nonagricultural payrolls expanded by 12,500 in June, to an estimated 2,183,600 jobs, as reported by the establishment survey. The gain was weaker than last year's May-June increase, leaving the state 24,300 jobs short of June 1990's job total. Seasonal growth, though slower-paced than in past years, was the dominant trend.

The goods-producing sector, which accounts for fewer than one out of every five wage and salary jobs, was responsible for more than its share of new jobs in June. Manufacturing added 1,400 jobs, with nondurable goods reporting the strongest growth. Improvement was noted in transportation equipment and food processing. Factory employment, however, is down by 8,900 from a year ago. The construction industry advanced by 1,200 jobs, a rather tepid seasonal increase, with special trade contractors accounting for most of the growth. Construction remains 7,000 jobs below last June's level. The tiny mining division receded by 100 jobs in June, remaining stable over the year.

Among service-producers, the largest division, services, dominated the job gains, adding 8,600. Seasonal expansion in amusements and recreation, hotels and motels, and agricultural services bolstered the market. Growth also occurred in business and health services, while private education payrolls were reduced for the summer. Since last year, services has been essentially unchanged, though significant movement has occurred among various industries within the division. The most notable trend has been the rapid growth in health services, which appears to be the state's most recession-resistant private industry.

Trade, the second largest service-producer, advanced by 7,000 jobs in June, with 6,500 added in retail trade. Most of the new employment was part of a seasonal increase in restaurants. Since June 1990 trade has declined by 6,500 jobs, with 5,000 of that loss absorbed by retailers. Transportation, communication, and public utilities rose by 500, primarily due to hiring in trucking. Over the year, this industry division has dropped by 1,200 jobs. Employment in finance, insurance, and real estate was up 700 in June, but down 1,900 since last year. Government was the only service-producer to decline over the month, receding by 6,800 jobs, as public schools and colleges and universities trimmed their workforces for the summer. Budget shortfalls added some indefinite layoffs to the normal seasonal furloughs. Federal employment and noneducation state and local jobs, however, were up. Government is the only industry division posting a net gain over the year. A total of 1,200 jobs have been added, with growth recorded in state and local governments, while federal employment has declined.

Hours and earnings for manufacturing production workers both registered gains in June. The average workweek increased by 0.4 hour to 40.7 hours. For durable goods workers this amounted to a mere gain of 0.1 hour to 41.9 hours, while nondurable goods workers saw a solid increase of 0.6 hour to 39.6 hours. Average hourly pay for production workers inched up \$.01 to \$11.85. Earnings for durable goods workers averaged \$12.53 per hour, up \$.01, while nondurable goods workers' hourly earnings were unchanged at \$11.21. With the increase in the workweek, average weekly earnings in factories rose to \$482.30, up \$5.15 from May. A gain of \$1.67 pushed durable goods' weekly earnings up to \$525.01, and in nondurable goods, a heftier \$6.73 increase boosted weekly pay to \$443.92.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JUNE 1991

Industry	June 1991	May 1991	June 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,183.6	2,171.1	2,207.9
Goods Producing	358.6	356.1	374.5
Mining	2.1	2.2	2.1
Construction	156.8	155.6	163.8
Heavy Construction	19.2	19.0	20.0
Manufacturing	199.7	198.3	208.6
Durable Goods	102.6	102.2	110.8
Lumber & Wood Products	4.1	4.0	4.2
Stone, Clay, & Glass Products	8.4	8.2	8.7
Concrete, Gypsum, Plaster	5.2	5.2	5.4
Other Stone, Clay, & Glass	3.2	3.0	3.3
Primary Metal Industries	10.0	10.2	11.0
Blast Furnaces	8.3	8.5	9.2
Fabricated Metal Products	9.8	9.8	9.9
Fabricated Structural Metal Products	4.1	4.1	4.3
Other Fabricated Metal Products	4.6	4.6	4.6
Industrial Machinery	15.7	15.7	16.6
Refrigeration & Service Mach.	2.2	2.2	2.4
Other Industrial Machinery & Equipment	9.3	9.3	9.7
Electronic Equipment	14.3	14.4	16.3
Communications Equipment	4.2	4.2	4.4
Electronic Component	3.5	3.6	4.1
Other Electronic Equipment	6.6	6.6	7.8
Transportation Equipment	12.7	12.2	14.3
Motor Vehicles	5.1	5.0	5.7
Other Transportation	3.1	2.7	3.6
Instruments & Related	22.0	22.1	24.2
Miscellaneous Manufacturing	2.7	2.7	2.7
Nondurable Goods	97.1	96.1	97.8
Food & Kindred Products	25.4	25.0	25.1
Meat Products	6.0	6.0	5.7
Beverages	4.3	4.3	4.4
Other Food & Kindred	10.0	9.8	10.0
Textile Mill, Apparel	9.9	9.8	10.2
Paper & Allied Products	9.7	9.6	9.5
Printing & Publishing	27.8	27.8	28.8
Chemicals and Allied Products	13.7	13.6	13.7
Rubber & Miscellaneous	8.5	8.3	8.5
Other Nondurable Goods	2.1	2.0	2.0

Industry	June 1991	May 1991	June 1990
Service Producing	1,825.0	1,815.0	1,833.4
Transportation & Public Utilities	101.9	101.4	103.1
Transportation	57.1	56.8	58.4
Railroad Transportation	4.4	4.4	4.7
Trucking & Warehousing	29.4	29.0	29.5
Communications & Utilities	44.8	44.6	44.7
Communications	28.3	28.1	28.3
Electric, Gas, Sanitary	16.5	16.5	16.4
Trade	535.0	528.0	541.5
Wholesale Trade	108.3	107.8	109.8
Retail Trade	426.7	420.2	431.7
Building Materials, Garden Supplies	18.4	18.2	18.6
General Merchandise	43.5	43.0	44.7
Food Stores	66.2	65.7	66.7
Eating & Drinking Places	143.0	137.8	143.3
Finance, Insurance, & Real Estate	131.8	131.1	133.7
Finance	57.6	57.3	59.6
Depository Institutions	42.6	42.2	43.8
Commercial Banks	27.5	27.3	28.2
Insurance	39.0	39.0	38.9
Insurance Carriers	25.9	25.8	25.6
Real Estate	35.2	34.8	35.2
Services	634.7	626.1	634.7
Business Services	134.9	133.8	136.9
Health Services	163.4	162.0	158.8
Hospitals	80.6	79.7	78.3
Legal Services	16.5	16.0	16.5
Educational Services	33.2	36.3	33.2
Private Colleges, Universities	16.5	18.6	16.4
Total Government	421.6	428.4	420.4
Total Federal Government	133.7	133.4	138.3
Department of Defense	48.2	47.9	47.0
Other Federal Government	85.5	85.5	91.3
Total State & Local Government	287.9	295.0	282.1
Total State Government	97.4	100.5	94.5
State Education	30.5	34.3	27.7
Other State Government	66.9	66.2	66.8
Total Local Government	190.5	194.5	187.6
Local Education	113.3	118.8	111.5
Other Local Government	77.2	75.7	76.1

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES

JUNE 1991

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	June 1991	May 1991	June 1991	May 1991	June 1991	May 1991
MARYLAND						
Manufacturing	40.7	40.3	\$482.30	\$477.15	\$11.85	\$11.84
Durable Goods	41.9	41.8	525.01	523.34	12.53	12.52
Lumber and Wood Products	39.8	39.2	360.19	350.84	9.05	8.95
Stone, Clay, and Glass Products	44.7	44.1	510.92	499.21	11.43	11.32
Primary Metal Industries	42.6	42.8	699.92	701.06	16.43	16.38
Blast Furnaces	42.9	43.2	707.85	717.12	16.50	16.60
Fabricated Metals	40.9	40.7	444.58	435.90	10.87	10.71
Industrial Machinery	41.0	40.4	525.21	517.93	12.81	12.82
Electronic Equipment	45.1	44.9	417.18	418.92	9.25	9.33
Transportation Equipment	39.8	40.5	635.61	656.91	15.97	16.22
Instruments and Related Products	42.4	42.0	583.00	567.00	13.75	13.50
Miscellaneous Manufacturing Industries	41.2	40.6	405.82	393.82	9.85	9.70
Nondurable Goods	39.6	39.0	443.92	437.19	11.21	11.21
Food and Kindred Products	40.2	39.1	423.71	408.60	10.54	10.45
Textile Mill, Apparel	36.6	36.0	276.33	273.60	7.55	7.60
Paper and Allied Products	43.0	42.3	490.20	494.91	11.40	11.70
Printing and Publishing	36.0	36.4	495.00	495.04	13.75	13.60
Chemicals and Allied Products	41.0	40.5	512.50	510.30	12.50	12.60
Rubber and Plastic Products	43.5	42.7	439.35	424.87	10.10	9.95
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.1	41.0	\$507.59	\$507.17	\$12.35	\$12.37
Durable Goods	42.0	42.1	555.24	558.25	13.22	13.26
Nondurable Goods	40.2	39.8	459.89	455.31	11.44	11.44

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Labor force activity was minimal in the Baltimore Metropolitan Area in June, causing unemployment to remain unchanged at 6.6 percent. Job market dropouts slightly outnumbered entrants, prompting a marginal decline of 142 labor force participants. Unemployment crept up by 250 and employment receded by 392. Little change in joblessness from May was noted in any of the region's jurisdictions. Baltimore City posted the area's highest unemployment rate at 9.6 percent, and Howard County, at 4.2 percent, the lowest. Metro area joblessness was up significantly from last year's 4.9 percent, as the unemployment rolls grew by 20,700.

The business establishment survey recorded an increase of 3,400 payroll jobs in the Baltimore Metropolitan Area in June. Services captured the largest share of new jobs, spurred on by hiring in amusement and recreation, health, and business services. The construction industry showed signs of recovery, with particularly strong growth in special trades. Restaurants led the employment gain in trade. Government was the only division to lose jobs in June, as summer staff reductions in state and local education curtailed the industry.

MARYLAND'S D.C. SUBURBS

Unemployment inched up by 0.1 percentage points to 4.5 percent in Maryland's Washington, D.C. suburbs, as the area posted the state's lowest jobless level. Seasonal growth swelled the labor force by 4,498 persons, boosting the employed by 2,927 and adding 1,571 to the jobless count. Last year's May-June unemployment increase was considerably higher. Joblessness, however, was a much lower 3.4 percent a year ago, with almost 10,800 fewer area residents unemployed.

Nonagricultural payroll employment rose by 3,800 in June. Nine out of ten new jobs opened up in services-producing industries, despite considerable seasonal decline in government. Growth was strongest in the services division, with amusement and recreation leading the advance. Restaurants were responsible for a major portion of new jobs in trade. Among goods-producers, only construction was able to post a rather anemic gain.

WESTERN MARYLAND

Western Maryland's job market deteriorated in June as unemployment climbed from 8.7 to 9.4 percent. All three counties registered unemployment gains as the region claimed the state's highest jobless rate. Two furloughs in transportation equipment, coupled with layoffs in education, were responsible for much of the slowdown. An estimated 1,340 persons joined the labor force, as unemployment rose by 890 and employment grew by 450. Last June unemployment stood at 7.3 percent, when about 2,500 fewer Western Marylanders were out of work.

Wage and salary employment increased by 700 in June. Services was the top growth industry, with health services claiming many of the new jobs. Manufacturing, while second in job gains,

reported minor accessions in a number of industrial areas. Little hiring activity was reported in trade, usually a solid growth industry in June. Government was the only division to decline over the month.

BALANCE OF STATE

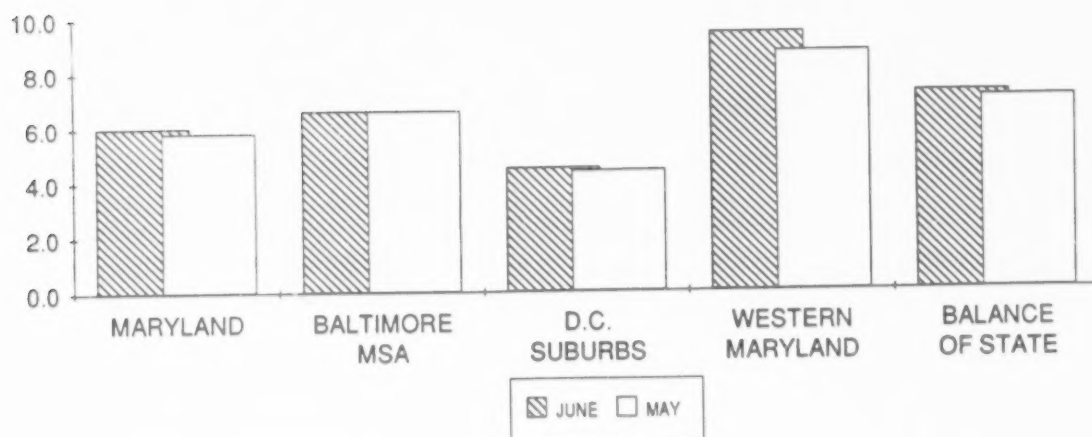
The job market picked up in the Balance of State area in June, as the local economy approached its seasonal peak. Job growth, however, was not able to keep pace with a rapid labor force expansion, causing joblessness to rise 0.2 percentage points to 7.0 percent. A total of 6,935 persons were added to the labor force, as the number of employed grew by 6,052 and the unemployed increased by 883. County jobless trends varied, with most showing an increase, while a few declined. Unemployment ranged from Worcester's 4.6 percent to 9.1 percent in Cecil. Seasonal growth in food processing and tourist-related industries in some counties contrasted with manufacturing layoffs in others, causing the divergent trends. The regional economy has stagnated since last June when unemployment was a more moderate 5.3 percent and about 4,200 fewer area residents were jobless.

An increase of 5,400 jobs in the Balance of State region in June was reported by the establishment survey. Most of the new jobs opened up in trade, the majority due to restaurant hiring. Brisk job growth in hotels and motels was responsible for much of the surge in services employment. Food processing led the job gains in manufacturing. Seasonal furloughs caused reductions in government employment.

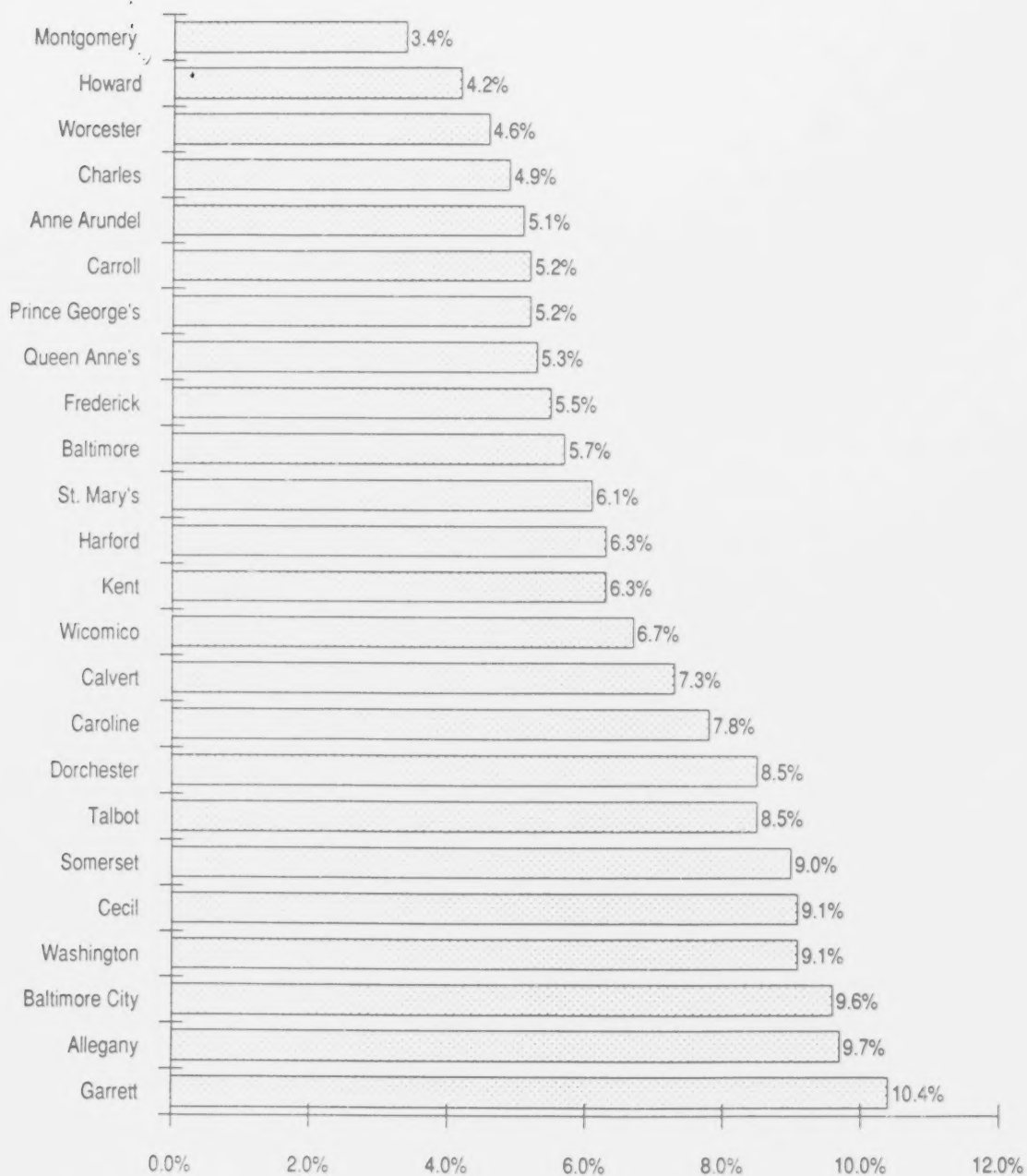
TOTAL UNEMPLOYMENT-MARYLAND AND REGIONS

	JUNE 1991		MAY 1991	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	152,105	6.0	148,510	5.8
BALTIMORE METROPOLITAN AREA	80,227	6.6	79,977	6.6
MARYLAND'S D.C. SUBURBS	45,490	4.5	43,919	4.4
WESTERN MARYLAND	10,424	9.4	9,534	8.7
BALANCE OF STATE	15,964	7.2	15,081	7.0

UNEMPLOYMENT RATES - JUNE 1991



LOCAL UNEMPLOYMENT RATES-JUNE 1991



STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE
JUNE 1991

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	JUNE	MAY*	JUNE	MAY*	JUNE	MAY*	JUNE	MAY*	JUNE 1990
MARYLAND	2,555,640	2,543,010	2,403,535	2,394,500	152,105	148,510	6.0	5.8	4.4
BALTIMORE METROPOLITAN AREA	1,217,746	1,217,888	1,137,519	1,137,911	80,227	79,977	6.6	6.6	4.9
BALTIMORE CITY	349,020	348,877	315,571	315,679	33,449	33,198	9.6	9.5	7.5
ANNE ARUNDEL	216,413	216,389	205,481	205,552	10,932	10,837	5.1	5.0	3.2
BALTIMORE	393,873	394,070	371,480	371,608	22,393	22,462	5.7	5.7	4.4
CARROLL	63,584	63,731	60,289	60,309	3,295	3,422	5.2	5.4	4.0
HARFORD	84,349	84,403	79,012	79,039	5,337	5,364	6.3	6.4	4.3
HOWARD	94,454	94,429	90,478	90,509	3,976	3,920	4.2	4.2	2.4
QUEEN ANNE'S	16,054	15,987	15,209	15,214	845	773	5.3	4.8	3.3
D. C. AREA	1,006,313	1,001,815	960,823	957,896	45,490	43,919	4.5	4.4	3.4
CALVERT	24,063	23,957	22,310	22,242	1,753	1,715	7.3	7.2	4.1
CHARLES	48,130	47,927	45,774	45,634	2,356	2,293	4.9	4.8	3.3
FREDERICK	78,237	78,318	73,945	73,720	4,292	4,598	5.5	5.9	3.5
MONTGOMERY	429,563	427,694	414,835	413,572	14,728	14,122	3.4	3.3	2.7
PRINCE GEORGE'S	426,320	423,918	403,959	402,728	22,361	21,190	5.2	5.0	4.1
WESTERN MARYLAND	110,627	109,287	100,203	99,753	10,424	9,534	9.4	8.7	7.3
ALLEGANY	33,343	33,356	30,109	30,169	3,234	3,187	9.7	9.6	8.6
GARRETT	14,534	14,109	13,025	12,747	1,509	1,362	10.4	9.7	8.4
WASHINGTON	62,750	61,822	57,069	56,837	5,681	4,985	9.1	8.1	6.3
BALANCE OF STATE	220,954	214,019	204,990	198,938	15,964	15,081	7.2	7.0	5.3
CAROLINE	15,007	14,481	13,830	13,489	1,177	992	7.8	6.9	4.1
CECIL	36,905	36,800	33,536	33,616	3,369	3,184	9.1	8.7	6.0
DORCHESTER	17,439	17,068	15,951	15,706	1,488	1,362	8.5	8.0	6.1
KENT	9,637	9,529	9,033	8,994	604	535	6.3	5.6	4.2
ST. MARY'S	43,490	43,363	40,832	40,909	2,658	2,454	6.1	5.7	4.5
SOMERSET	13,203	13,401	12,015	11,919	1,188	1,482	9.0	11.1	10.8
TALBOT	18,208	17,363	16,654	16,515	1,554	848	8.5	4.9	4.4
WICOMICO	39,855	39,676	37,176	36,897	2,679	2,779	6.7	7.0	5.6
WORCESTER	27,210	22,338	25,963	20,893	1,247	1,445	4.6	6.5	3.9
UNITED STATES**	127,054,000	124,857,000	118,280,000	116,624,000	8,774,000	8,233,000	6.9	6.6	5.3

*Estimates for the state are revised.

**Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
BY REGION--JUNE 1991

Industry	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	June 1991	May 1991	June 1991	May 1991	June 1991	May 1991	June 1991	May 1991
Total Nonagricultural Employment	1,151.0	1,147.6	782.2	778.5	94.7	94.0	150.1	143.9
Goods Producing	199.2	197.1	101.1	100.8	22.2	21.8	34.1	33.3
Mining	0.5	0.5	0.5	0.6	0.8	0.8	0.2	0.2
Construction	73.7	72.2	65.2	64.8	5.6	5.5	10.3	10.2
Manufacturing	125.0	124.4	35.4	35.4	15.8	15.5	23.6	22.9
Durable Goods	68.8	68.4	17.7	17.7	7.2	7.1	8.8	8.7
Nondurable Goods	56.2	56.0	17.7	17.7	8.6	8.4	14.8	14.2
Service Producing	951.8	950.5	681.1	677.7	72.5	72.2	116.0	110.6
Transportation & Public Utilities	56.3	55.8	34.1	33.9	5.3	5.3	7.4	7.4
Trade	268.3	266.8	199.0	197.4	26.5	26.4	39.9	36.3
Wholesale Trade	62.9	62.6	35.6	35.2	5.1	5.0	5.3	5.1
Retail Trade	205.4	204.2	163.4	162.2	21.4	21.4	34.6	31.2
Finance, Insurance, & Real Estate	75.5	75.2	46.1	45.8	3.3	3.2	5.5	5.1
Services	335.2	332.5	238.6	234.8	22.0	21.6	37.1	35.0
Total Government	216.5	220.2	163.3	165.8	15.4	15.7	26.1	26.8
Federal	51.0	51.0	74.2	73.7	1.8	1.8	6.9	6.9
State	72.0	74.0	16.7	17.7	5.2	5.2	4.5	5.3
Local	93.5	95.2	72.4	74.4	8.4	8.7	14.7	14.6

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	June 1991	May 1991	June 1990
Initial Claims	24,069	26,257	17,349
Weeks Claimed	267,450	298,313	139,257
First Payments	9,752	10,723	6,897
Final Payments	4,942	4,444	2,015
Weeks Paid	206,089	239,064	123,175
Net Benefit Amount	\$36,925,547	\$42,698,415	\$17,263,383
Average Check Amount	\$179.17	\$178.61	\$140.15

While workload estimates measured by activity at Maryland's local unemployment offices have remained appreciably above those of last year, the monthly changes reported during June, for the most part, followed normal seasonal patterns. Following a modest increase in May, the number of initial claims for benefits dropped by just over 8.0 percent to 24,069, their lowest monthly level so far this year. In similar fashion, the number of weeks claimed also declined to a low point for 1991, falling by nearly 31,000 to 267,450 in June. About 77.0 percent of all weeks claimed during June resulted in payments, down from May's payment ratio of about 80.0 percent and significantly below last year's figure of close to 89.0 percent. Final benefit payments rose by about 500 over the month, numbering 4,942 in June. Since last year, the number of exhaustions has more than doubled, an indication of the toll that the 1990-1991 recession has taken on unemployment filers. For those claimants receiving benefits during June, payments averaged about \$179.17 per week, up slightly from May's weekly benefit of \$178.61.

REGIONAL INDICATORS JUNE 1991

	BMA	DC Suburbs	Western Maryland	Balance of State
First Payments	5,167	2,304	990	658
Final Payments	2,618	1,114	399	415
Weeks Paid	107,458	49,919	15,622	17,254
Average Check Amount	\$179.42	\$188.27	\$165.44	\$152.39

The statewide decline in weekly payment activity was reflected across the board regionally. In the highly seasonal Balance of State area, a reduction of slightly more than 21.0 percent in weekly payments lowered June's estimate to 17,254. This reduction was prompted by declines in each of the region's local jurisdictions with the exception of Talbot County where manufacturing layoffs heightened payment activity. For those claimants receiving benefits, compensation amounts ranged from a low of \$152.39 in the Balance of State region to a high of \$188.27 in Maryland's D.C. suburbs. In the Baltimore Metro Area, checks, however, were slightly smaller, by about \$.50, in June.

 Maryland
Department of Economic &
Employment Development

OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
Baltimore, Maryland 21201



POSTAGE AND FEES PAID
EMPLOYMENT SECURITY MAIL
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Suite 800
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LABOR MARKET DIMENSIONS

JULY, 1991

**Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201**

**William Donald Schaefer, Governor
Mark L. Wasserman, Secretary**

LABOR FORCE DEVELOPMENTS

While the strength of the recovery remains uncertain, it appears that jobseekers, particularly young people, are encouraged by signs of a turnaround in business conditions. During July, more than 70,000 jobseekers entered the labor market, pushing the civilian labor force up over the 2.6 million mark. Just over 50.0 percent of this increase was attributable to new and en-entrant jobseekers, a pool which characteristically includes a large segment of the student population. Employment moved ahead at a slightly higher rate, causing joblessness to decline by about 7,750 persons and lowering the jobless rate from 6.0 percent in June to 5.5 percent in July.

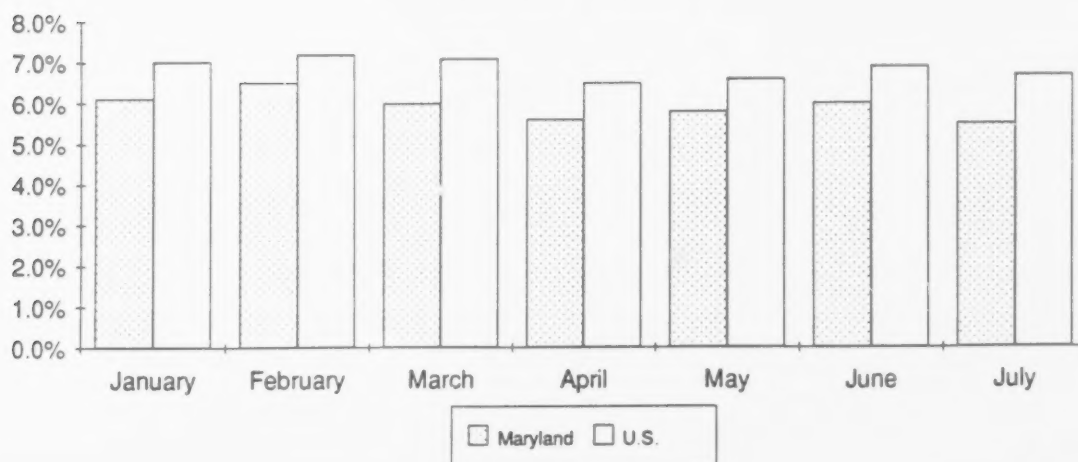
Nationally, unemployment while declining from 6.9 percent to 6.7 percent, exceeded the statewide average by more than a full percentage point in July.

	July 1991	June 1991	July 1990
Civilian Labor Force	2,627,635	2,555,200	2,606,473
Total Employment	2,483,349	2,403,158	2,476,424
Total Unemployment	144,286	152,042	130,049
Unemployment Rate	5.5	6.0	5.0
National Unemployment Rate	6.7	6.9	5.5

If the current recovery follows past trends, employment gains will be uneven and normal seasonal patterns may be altered as the economy continues a restructuring process. Movements in the unemployment rate will most likely be erratic before a period of consistent and uninterrupted employment growth can be achieved, thus stabilizing and, ultimately improving joblessness.

The large gain in employment reflected in the residential measurement was not supported by preliminary job counts reported by employers in Maryland's business establishments. A number of factors skewed comparability. The presence of strike activity in the manufacturing sector, the lag in reporting by a number of services and trade establishments (industries which employ a large number of youth), and suspected employment losses among multiple jobholders contributed to the incongruity.

UNEMPLOYMENT RATES MARYLAND AND U.S. JANUARY-JULY 1991



INDUSTRY DEVELOPMENTS

The number of jobs provided by businesses in Maryland declined during July; however, the drop was slightly higher than the norm. Seasonal factors, coupled with relatively stagnant business conditions and reports of strike activity in the manufacturing sector, resulted in the loss of an estimated 23,400 jobs during July.

The impact of seasonal economics was most prevalent in state and local government where payrolls dropped sharply as educational facilities continued their semester break reductions. The drop in education was cushioned somewhat by hiring in other government jobs, particularly in local noneducation where seasonal hiring at recreational facilities and in other government-sponsored outdoor programs reduced the overall industry deficit by about 5,600 jobs.

Employment in the transportation sector also receded, with seasonal layoffs by private school bus carriers and reduced business activity in trucking and warehousing pulling down the job count. Meanwhile, in the services sector, normal July reductions in private education offset seasonal upswings in amusements and membership organizations. Losses, on a more limited scale, were reported in agricultural services. After reaching their summertime peak in June, employment in this industry dropped back by about 300 jobs in July. Demand was also down in business services during July, with losses centered primarily in computer and data processing firms.

In the population-serving trade sector, retail trade experienced a small, but unexpected, setback. While trends in apparel, furniture and building material/garden supply stores were relatively consistent with past years, the movements reported in general merchandise, food stores and eating establishments really swayed overall industry performance. In both general merchandise and eating places where growth is the norm during July, employment declines occurred. In food stores which last year rose by 500 jobs during July, a stagnant employment picture prevailed. In all, about 900 fewer jobs were reported by retailers in July.

The construction industry, still lacking the stamina necessary to ensure an imminent recovery, dropped by about 400 jobs. July's loss, while relatively small and not unusual for this time of year, reverses a trend which had been gradually uplifting the industry since February, 1991. Currently, employment in construction, at 156,500, is running about 7,000 below year ago figures. The general lack of vitality in general building construction has impeded the overall recovery process in this industry.

Following a gain of about 1,700 jobs in June, the manufacturing industry took a giant step backward in July, with employment declines totaling about 4,100. About 75.0 percent of this decline, however, was tied directly to strike activity in two separate industry lines. In transportation equipment, a strike-related decline of about 2,900 was reported and, in beverages, just over 300 jobs were affected by strike activity. Aside from declining employment in these industry groups, vacation shutdowns caused employment to temporarily subside in textile and apparel products.

While layoffs occurred in manufacturing, the status of production workers overall remained relatively unchanged. Work schedules were maintained at 40.7 hours per week in July, however, a drop of about \$.16 in hourly pay rates lowered weekly checks by about \$6.50 to \$475.78. Changes were much more apparent at the detailed industry level. In transportation equipment, for instance, workweeks fell by about 1.5 hours to 37.8 in July. This decline, coupled with a reduction of \$3.37 in hourly pay rates, caused weekly checks to drop sharply from \$626.84 in June to \$475.52 in July. In rubber products, workweeks were also reduced, by about 2.0 hours, however, the impact of this decline on earnings was less noticeable due to an increase in hourly pay rates from \$9.95 to \$10.10. In chemical products, on the other hand, increased overtime, coupled with hourly pay increases, raised weekly wages by more than \$22.00 to \$532.57 in July.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JULY 1991

Industry	July 1991	June 1991	July 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,158.8	2,182.2	2,193.6
Goods Producing	354.5	359.0	373.3
Mining	2.1	2.1	2.1
Construction	156.5	156.9	163.5
Heavy Construction	19.1	19.1	20.3
Manufacturing	195.9	200.0	207.7
Durable Goods	99.1	102.7	109.9
Lumber & Wood Products	4.0	4.1	4.3
Stone, Clay, & Glass Products	8.3	8.4	8.6
Concrete, Gypsum, Plaster	5.2	5.2	5.4
Other Stone, Clay, & Glass	3.1	3.2	3.2
Primary Metal Industries	10.0	10.0	11.1
Blast Furnaces	8.3	8.3	9.3
Fabricated Metal Products	9.8	9.8	9.9
Fabricated Structural Metal Products	4.1	4.1	4.2
Other Fabricated Metal Products	4.6	4.6	4.6
Industrial Machinery	15.4	15.7	16.5
Refrigeration & Service Mach.	2.1	2.2	2.3
Other Industrial Machinery & Equipment	9.3	9.3	9.7
Electronic Equipment	14.4	14.3	15.7
Communications Equipment	4.2	4.2	4.4
Electronic Component	3.5	3.5	4.0
Other Electronic Equipment	6.7	6.6	7.3
Transportation Equipment	9.9	12.8	14.1
Motor Vehicles	2.3	5.1	5.6
Other Transportation	3.2	3.2	3.6
Instruments & Related	22.0	22.0	24.2
Miscellaneous Manufacturing	2.6	2.7	2.6
Nondurable Goods	96.8	97.3	97.8
Food & Kindred Products	25.4	25.4	25.3
Meat Products	5.8	6.0	5.7
Beverages	4.3	4.4	4.5
Other Food & Kindred	10.3	9.9	10.2
Textile Mill, Apparel	9.7	9.9	10.0
Paper & Allied Products	9.7	9.7	9.6
Printing & Publishing	27.9	28.0	28.7
Chemicals and Allied Products	13.6	13.7	13.8
Rubber & Miscellaneous	8.4	8.5	8.3
Other Nondurable Goods	2.1	2.1	2.1

Industry	July 1991	June 1991	July 1990
Service Producing	1,804.3	1,823.2	1,820.3
Transportation & Public Utilities	101.3	101.6	102.6
Transportation	56.2	56.7	57.7
Railroad Transportation	4.4	4.4	4.7
Trucking & Warehousing	29.0	29.2	29.5
Communications & Utilities	45.1	44.9	44.9
Communications	28.4	28.2	28.6
Electric, Gas, Sanitary	16.7	16.7	16.3
Trade	534.0	534.9	543.5
Wholesale Trade	108.3	108.3	110.2
Retail Trade	425.7	426.6	433.3
Building Materials, Garden Supplies	17.8	18.4	18.2
General Merchandise	43.8	43.9	45.4
Food Stores	66.3	66.3	67.2
Eating & Drinking Places	142.5	142.8	143.5
Finance, Insurance, & Real Estate	131.7	131.8	133.9
Finance	57.5	57.5	59.5
Depository Institutions	42.6	42.5	43.7
Commercial Banks	27.4	27.5	28.2
Insurance	39.1	39.2	38.9
Insurance Carriers	25.9	26.0	25.6
Real Estate	35.1	35.1	35.5
Services	633.9	634.1	634.6
Business Services	134.7	135.1	136.7
Health Services	163.7	163.6	159.4
Hospitals	80.7	80.6	78.6
Legal Services	16.5	16.5	16.5
Educational Services	32.0	33.1	31.4
Private Colleges, Universities	16.5	16.5	16.3
Total Government	403.4	420.8	405.7
Total Federal Government	134.5	133.7	138.8
Department of Defense	48.2	48.1	46.8
Other Federal Government	86.3	85.6	92.0
Total State & Local Government	268.9	287.1	266.9
Total State Government	93.3	96.7	92.2
State Education	25.9	29.9	24.9
Other State Government	67.4	66.8	67.3
Total Local Government	175.6	190.4	174.7
Local Education	92.9	113.3	91.1
Other Local Government	82.7	77.1	83.6

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES

JULY 1991

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	July 1991	June 1991	July 1991	June 1991	July 1991	June 1991
MARYLAND						
Manufacturing	40.7	40.7	\$475.78	\$482.30	\$11.69	\$11.85
Durable Goods	42.1	42.0	508.57	528.36	12.08	12.58
Lumber and Wood Products	39.1	39.8	342.13	358.20	8.75	9.00
Stone, Clay, and Glass Products	44.4	44.6	506.60	510.67	11.41	11.45
Primary Metal Industries	44.3	43.8	738.04	728.83	16.66	16.64
Blast Furnaces	44.9	44.5	754.32	745.38	16.80	16.75
Fabricated Metals	40.0	40.8	433.20	440.23	10.83	10.79
Industrial Machinery	41.8	41.0	537.13	524.39	12.85	12.79
Electronic Equipment	46.3	45.3	431.52	420.84	9.32	9.29
Transportation Equipment	37.8	39.9	475.52	626.84	12.58	15.95
Instruments and Related Products	41.5	42.5	564.40	586.50	13.60	13.80
Miscellaneous Manufacturing Industries	40.0	41.2	382.00	401.70	9.55	9.75
Nondurable Goods	39.7	39.6	450.99	443.12	11.36	11.19
Food and Kindred Products	40.4	40.1	423.80	419.45	10.49	10.46
Textile Mill, Apparel	36.6	36.5	289.14	279.23	7.90	7.65
Paper and Allied Products	42.9	43.0	508.37	498.80	11.85	11.60
Printing and Publishing	36.6	36.3	505.08	495.50	13.80	13.65
Chemicals and Allied Products	42.1	41.0	532.57	510.45	12.65	12.45
Rubber and Plastic Products	41.0	43.0	414.10	427.85	10.10	9.95
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.4	41.2	\$503.01	\$510.47	\$12.15	\$12.39
Durable Goods	42.3	42.2	533.40	562.10	12.61	13.32
Nondurable Goods	40.5	40.2	474.66	459.08	11.72	11.42

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Reacting to statewide trends, the jobless estimate in the Baltimore Metro Area moved down from 6.6 percent in June to 6.2 percent in July. While much higher than the year ago figure of 5.5 percent, the current rate shows a marked improvement over February 1991's peak of 7.0 percent. With the exception of Howard County where joblessness held steady at 4.2 percent, unemployment rates declined throughout the region. In Queen Anne's County, hiring in food processing helped to uplift local labor market conditions. Employment in the county rose by about 540, easing the burden of increased labor force participation and, at the same time, reducing the jobless rate by almost a full percentage point to 4.3 percent in July. Baltimore City's rate, while improving noticeably, remained the highest in the region at 9.0 percent.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. suburbs, about 4.2 percent of the area's residents were unemployed during July, down from June's reported rate of 4.5 percent. Employment in the region rose by an estimated 27,585 persons, an increase which helped to lower the unemployment count by 2,139 persons to 43,071 in July. While growth in the region's industry employment was checked by continuing layoffs in education, hiring activity did surface in construction, services, manufacturing and local noneducation. With this hiring, local jobless rates declined, with the lowest unemployment rate, of 3.1 percent, reported in Montgomery County and the highest, of 7.2 percent, in Calvert.

WESTERN MARYLAND

Western Maryland's job market moved ahead in July, with the jobless rate falling from 9.5 percent to 8.3 percent. While still high when compared to other regions of the state, July's unemployment rate is the lowest seen in the area since October 1990. In both Garrett and Washington counties, rising employment contributed to sizeable jobless declines. Garrett County's rate, while dropping by 0.8 percentage points to 9.7 percent, remained the highest in the state for the second consecutive month. In Allegany County, a different scenario unfolded. While unemployment in the county declined, movement in the jobless rate reacted to a shrinkage in the labor force rather than to an upturn in employment.

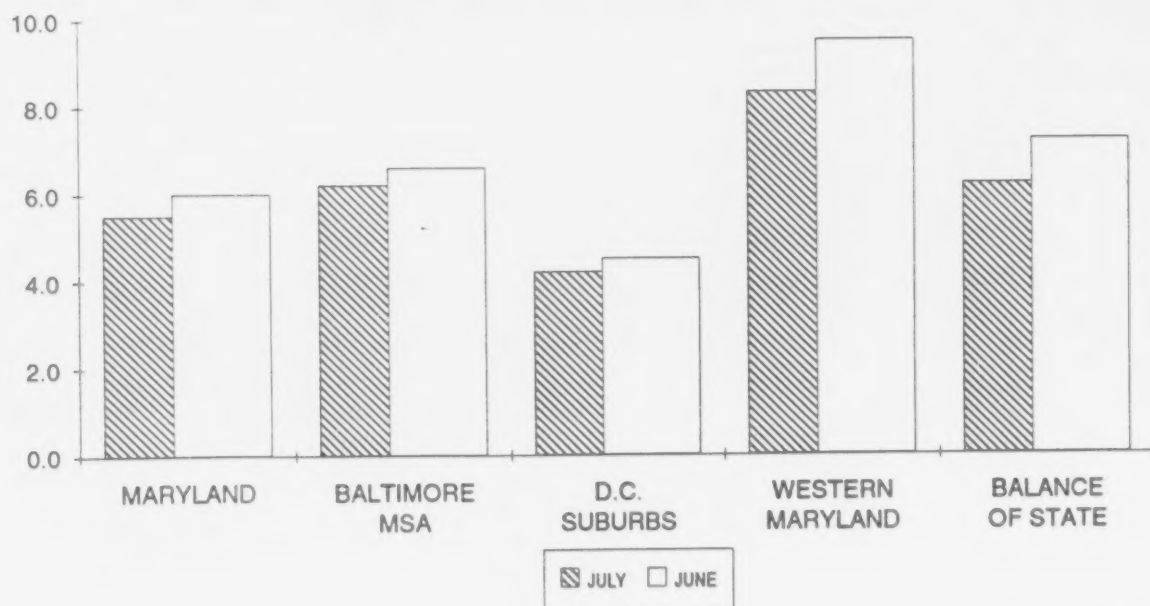
BALANCE OF STATE

In the Eastern Shore/Southern Maryland area, a reduction of about 1,600 on the regional unemployment rolls lowered the jobless rate by a full percentage point to 6.2 percent in July. With this decline, unemployment slipped below last year's estimate of 6.3 percent. About 11.5 percent of the statewide employment increase during July was centered in this highly seasonal region. Locally, employment increased and unemployment declined in each county with the exception of Kent and Wicomico. In Kent, the market reacted not only to an influx of jobseekers into the labor force but, also to temporary layoffs in the manufacturing industry. The net result was an increase in the county's jobless rate from 6.2 percent to 8.5 percent. In Wicomico, a small increase was noted in the county's unemployment count, however, this increase failed to raise the jobless rate from its level of 6.7 percent.

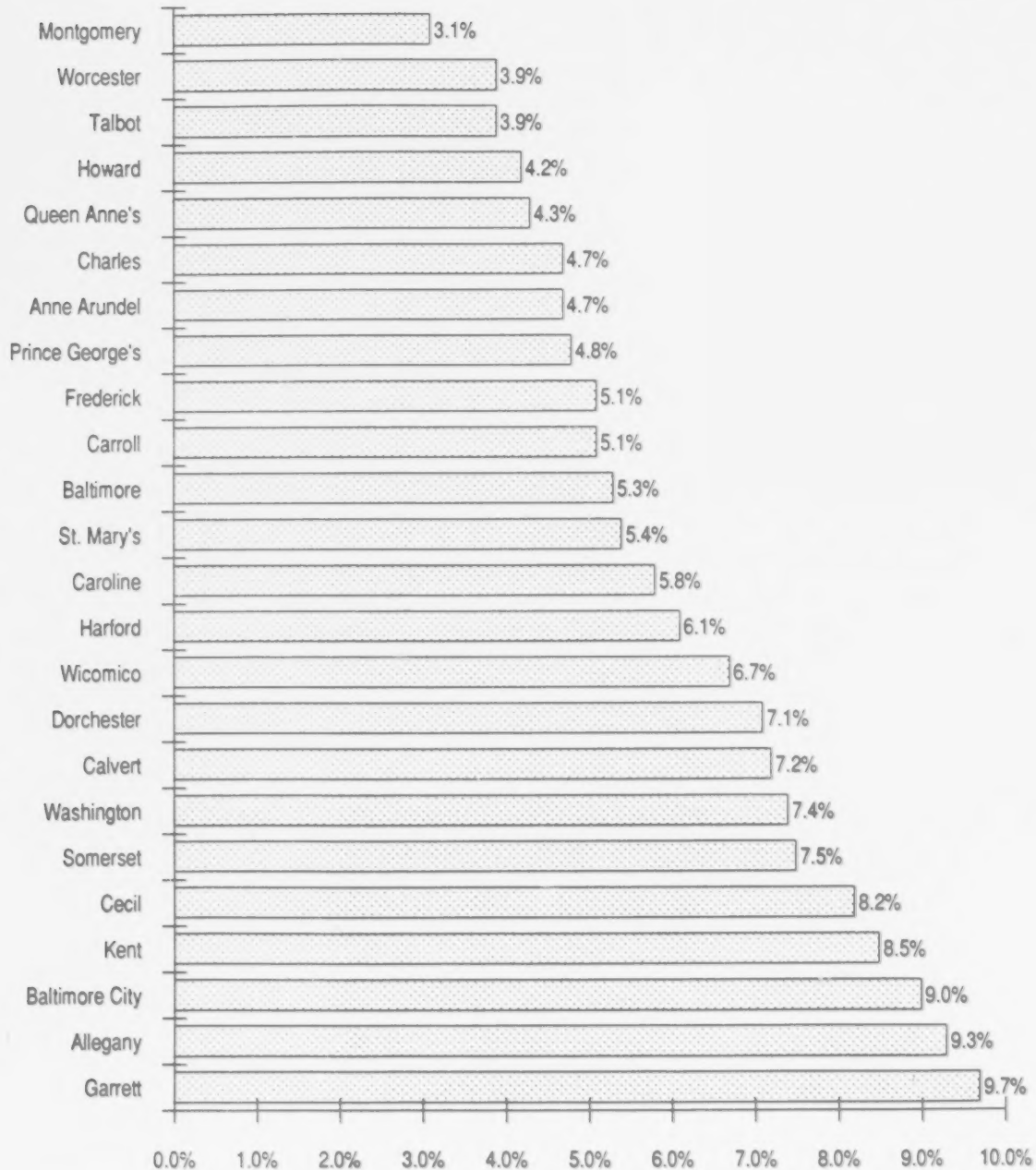
TOTAL UNEMPLOYMENT-MARYLAND AND REGIONS

	JULY 1991		JUNE 1991	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	144,286	5.5	152,042	6.0
BALTIMORE METROPOLITAN AREA	77,821	6.2	80,583	6.6
MARYLAND'S D.C. SUBURBS	43,071	4.2	45,210	4.5
WESTERN MARYLAND	9,174	8.3	10,408	9.5
BALANCE OF STATE	14,218	6.2	15,842	7.2

UNEMPLOYMENT RATES - JULY 1991



LOCAL UNEMPLOYMENT RATES-JULY 1991



STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE
JULY 1991

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	JULY	JUNE*	JULY	JUNE*	JULY	JUNE*	JULY	JUNE*	JULY 1990
MARYLAND	2,627,635	2,555,200	2,483,349	2,403,158	144,286	152,042	5.5	6.0	5.0
BALTIMORE METROPOLITAN AREA	1,256,310	1,218,502	1,178,489	1,137,919	77,821	80,583	6.2	6.6	5.5
BALTIMORE CITY	359,283	349,314	326,936	315,682	32,347	33,632	9.0	9.6	8.2
ANNE ARUNDEL	223,453	216,483	212,882	205,554	10,571	10,929	4.7	5.0	3.8
BALTIMORE	406,290	394,116	384,859	371,610	21,431	22,506	5.3	5.7	4.7
CARROLL	65,783	63,637	62,460	60,310	3,323	3,327	5.1	5.2	4.0
HARFORD	87,150	84,383	81,858	79,040	5,292	5,343	6.1	6.3	5.8
HOWARD	97,889	94,515	93,737	90,510	4,152	4,005	4.2	4.2	3.2
QUEEN ANNE'S	16,462	16,055	15,756	15,214	706	841	4.3	5.2	3.4
D. C. AREA	1,030,991	1,005,545	987,920	960,335	43,071	45,210	4.2	4.5	3.8
CALVERT	24,709	24,067	22,940	22,299	1,769	1,768	7.2	7.3	5.2
CHARLES	49,392	48,091	47,065	45,750	2,327	2,341	4.7	4.9	3.6
FREDERICK	80,136	78,207	76,030	73,907	4,106	4,300	5.1	5.5	4.7
MONTGOMERY	440,400	429,228	426,534	414,625	13,866	14,603	3.1	3.4	3.0
PRINCE GEORGE'S	436,354	425,952	415,351	403,754	21,003	22,198	4.8	5.2	4.4
WESTERN MARYLAND	111,179	109,657	102,005	99,249	9,174	10,408	8.3	9.5	7.9
ALLEGANY	32,851	33,038	29,798	29,819	3,053	3,219	9.3	9.7	9.5
GARRETT	14,848	14,403	13,412	12,897	1,436	1,506	9.7	10.5	8.9
WASHINGTON	63,480	62,216	58,795	56,533	4,685	5,683	7.4	9.1	6.9
BALANCE OF STATE	229,151	221,497	214,933	205,655	14,218	15,842	6.2	7.2	6.3
CAROLINE	15,054	15,062	14,183	13,881	871	1,181	5.8	7.8	4.4
CECIL	37,675	36,787	34,577	33,550	3,098	3,237	8.2	8.8	9.2
DORCHESTER	17,782	17,511	16,516	16,016	1,266	1,495	7.1	8.5	7.6
KENT	10,036	9,660	9,178	9,064	858	596	8.5	6.2	6.0
ST. MARY'S	45,348	43,587	42,911	40,939	2,437	2,648	5.4	6.1	5.0
SOMERSET	14,632	13,319	13,535	12,124	1,097	1,195	7.5	9.0	10.6
TALBOT	17,984	18,270	17,277	16,704	707	1,566	3.9	8.6	4.2
WICOMICO	40,759	40,010	33,040	37,332	2,719	2,678	6.7	6.7	6.7
WORCESTER	29,881	27,291	28,716	26,045	1,165	1,246	3.9	4.6	3.7
UNITED STATES**	127,327,000	127,054,000	118,751,000	118,280,000	8,576,000	8,774,000	6.7	6.9	5.5

*Estimates for the state are revised.

**Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
BY REGION--JULY 1991

Industry	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	July 1991	June 1991	July 1991	June 1991	July 1991	June 1991	July 1991	June 1991
Total Nonagricultural Employment	1,142.3	1,151.8	772.7	781.9	93.3	93.8	149.9	150.7
Goods Producing	195.7	199.2	101.3	101.0	21.8	22.1	33.7	34.2
Mining	0.6	0.5	0.5	0.5	0.8	0.8	0.2	0.2
Construction	73.5	73.5	65.3	65.1	5.6	5.6	10.3	10.3
Manufacturing	121.6	125.2	35.5	35.4	15.4	15.7	23.2	23.7
Durable Goods	65.7	68.9	17.7	17.7	6.9	7.1	8.7	8.8
Nondurable Goods	55.9	56.3	17.8	17.7	8.5	8.6	14.5	14.9
Service Producing	946.6	952.6	671.4	680.9	71.5	71.7	116.2	116.5
Transportation & Public Utilities	55.8	56.0	33.8	34.1	5.2	5.3	7.5	7.4
Trade	266.1	268.6	198.4	198.6	26.8	26.5	41.3	39.9
Wholesale Trade	62.3	62.9	35.3	35.4	5.1	5.1	5.3	5.3
Retail Trade	203.8	205.7	163.1	163.2	21.7	21.4	36.0	34.6
Finance, Insurance, & Real Estate	75.2	75.5	46.1	46.2	3.3	3.3	5.5	5.5
Services	335.6	336.0	238.6	238.5	21.9	21.8	37.2	37.1
Total Government	213.9	216.5	154.5	163.5	14.3	14.8	24.7	26.6
Federal	51.7	51.0	74.6	74.4	1.8	1.8	7.0	6.9
State	71.6	72.0	14.4	16.7	4.6	4.6	4.6	5.0
Local	90.6	93.5	65.5	72.4	7.9	8.4	13.1	14.7

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	July 1991	June 1991	July 1990
Initial Claims	34,741	24,069	20,139
Weeks Claimed	316,652	267,450	171,071
First Payments	13,048	9,752	9,505
Final Payments	7,420	4,942	2,924
Weeks Paid	241,441	206,089	129,781
Net Benefit Amount	\$42,958,465	\$36,925,547	\$21,832,299
Average Check Amount	\$177.93	\$179.17	\$168.22

An increase of 44.3 percent raised July's initial claims count to its highest level since January 1991. While initial claims normally rise during July, this year's increase far exceeded the expected seasonal upturn. July's increment of nearly 10,700 in initial claims filings pushed the monthly total up to 34,741. Last year, July's count stood at a much lower 20,139 following a monthly increase of just 16.1 percent. While lackluster business conditions and sporadic vacation shutdowns undoubtedly contributed to the surge in claims, filings also rose as workers indirectly affected by strike activity at two separate manufacturing facilities experienced unexpected layoffs. July's upturn also reflects the rise in activity associated with quarterly changes in base year determinations. Concomitant with the increase in initial claims, the number of weeks claimed for unemployment benefits grew by just over 18.0 percent to 316,652. Just over three-fourths of all weekly claims filed during July resulted in compensation, with payments averaging \$177.93, down slightly from June's check of \$179.17. During July, the payment of an estimated 241,441 weekly claims cost the Unemployment Insurance Trust Fund nearly \$43 million, a 16.4 percent increase over June's benefit outlay of \$36.9 million. Slightly more than 3.0 percent of all payments during July were final entitlements, up from 2.4 percent in June.

REGIONAL INDICATORS JUNE 1991

	BMA	DC Suburbs	Western Maryland	Balance of State
First Payments	6,913	2,868	901	1,598
Final Payments	3,876	1,752	657	524
Weeks Paid	128,452	59,212	16,940	19,325
Average Check Amount	\$177.41	\$186.35	\$163.39	\$155.48

With but a few exceptions, movements in regional measurements during July were indicative of the statewide trend. Payment activity increased across the state's four regions, with twenty-seven out of twenty-eight local offices reporting higher numbers of weekly payments. In the Balance of State area where an increase of 12.0 percent raised weekly payments to 19,325 in July, just over 80.0 percent of the regional upturn resulted from expanded activity at the Salisbury local office. For those claimants receiving benefits during July, payments ranged from a high of \$186.35 in the D.C. suburbs to a low of \$155.48 in the Balance of State. Claimants in the Balance of State, unlike in other regions of the state, did see an increase, of \$3.09, in their benefit checks over the month.

 Maryland
Department of Economic &
Employment Development

OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
Baltimore, Maryland 21201



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LABOR MARKET DIMENSIONS

AUGUST, 1991

**Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201**

**William Donald Schaefer, Governor
Mark L. Wasserman, Secretary**

LABOR FORCE DEVELOPMENTS

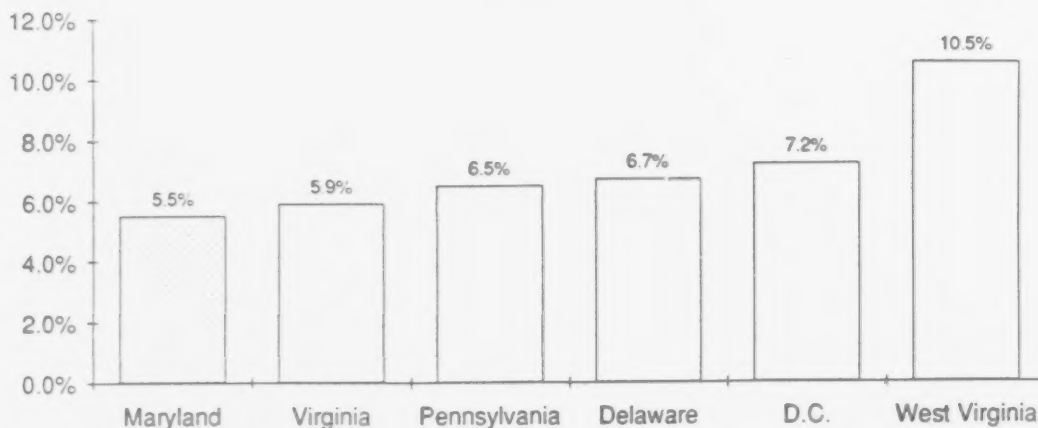
As seasonal activity began winding down, Maryland's labor market settled back, making its normal downward adjustments in August. Following a relatively large increase in July, statewide employment dropped back, with a large portion of this decline resulting from the end of temporary summer jobs. A corresponding drop in the labor force helped to offset this employment decline and, at the same time, to reduce the number of persons on Maryland's jobless rolls. While the jobless count subsided, the unemployment rate held steady at 5.5 percent in August.

Employment, while declining during August, is about 13,200 higher than last August when the recession was just beginning. Even so, a consistent pattern of improvement has yet to emerge and, with the large increase in the number of jobseekers entering the labor market over the past few months, unemployment has remained at recessionary levels. Since August, 1990, unemployment has ranged from 5.0 percent to 6.5 percent. Until economic recovery is firmly established, the unemployment level and the corresponding jobless rate will remain high.

	August 1991	July 1991	August 1990
Civilian Labor Force	2,596,055	2,627,981	2,567,774
Total Employment	2,453,696	2,483,862	2,440,473
Total Unemployment	142,359	144,119	127,301
Unemployment Rate	5.5	5.5	5.0
National Unemployment Rate	6.5	6.7	5.4

On a state-by-state basis, individual reactions to the recession and subsequent phases of economic recovery have differed. While many states appear to be experiencing the same labor market problems, Maryland's jobless rate is stacking up well against those of neighboring states. For the second consecutive month, Maryland's jobless rate has been the lowest in the region. During August, its closest rival, Virginia, reported a rate of 5.9 percent.

UNEMPLOYMENT IN NEIGHBORING STATES AUGUST 1991



INDUSTRY DEVELOPMENTS

While normal seasonal declines tempered industrial employment activity in August, lackluster economic growth continues to influence performance in a number of industry sectors. The loss of about 10,000 jobs in August resulted from a combination of factors including further reductions in education, cutbacks in tourism and other summer-related activities and unseasonably weak market conditions in the construction trades.

The services industry was the biggest contributor of job losses in the private sector, with an estimated decline of about 3,000. Slightly more than 50.0 percent of the industry descent, however, was tied to seasonal declines in educational and agricultural services and in membership organizations. In business services, a small, but unexpected, loss of 400 jobs added to the overall industry deficit. Engineering and architectural services, an industry which is heavily supported by construction activity, continued to react to the anemic business climate in construction by further downsizing during August.

Employment in trade establishments fell by 900 jobs during August, including a seasonal reduction of 500 jobs in eating and drinking establishments. Declines were also reported by auto dealers and at building material and furniture stores. Overall losses were limited somewhat by increased hiring at food and apparel stores. While lower employment levels in trade are a natural result of the end of the summer season, the economic expansion prior to the recession (1988 and 1989) extended the growth period for trade establishments. This year, however, with consumer demand still lagging, expansion beyond the summer season was checked.

The construction industry continues to be a major drag on Maryland's economy. Even with the lowering of interest rates, construction has achieved only modest success in recouping recessionary losses. During August, the industry experienced a small, but unexpected, setback. Declining by about 400 jobs through August and by about 8,000 jobs since last year, this industry has continued to struggle against a backdrop of relatively stagnant conditions in the residential and commercial market.

Finance, insurance and real estate, an industry in which employment patterns have been particularly erratic, reported additional cutbacks during August. The loss of about 600 jobs over the month brings the total employment decline in this sector since August 1990 to 2,900. Post recessionary conditions in both the insurance and real estate components have netted out to a "no growth" situation. In the finance sector, however, job increases in May and June were canceled out by subsequent declines through August. Nearly 80.0 percent of the overall industry loss since last year has resulted from layoffs in the finance sector.

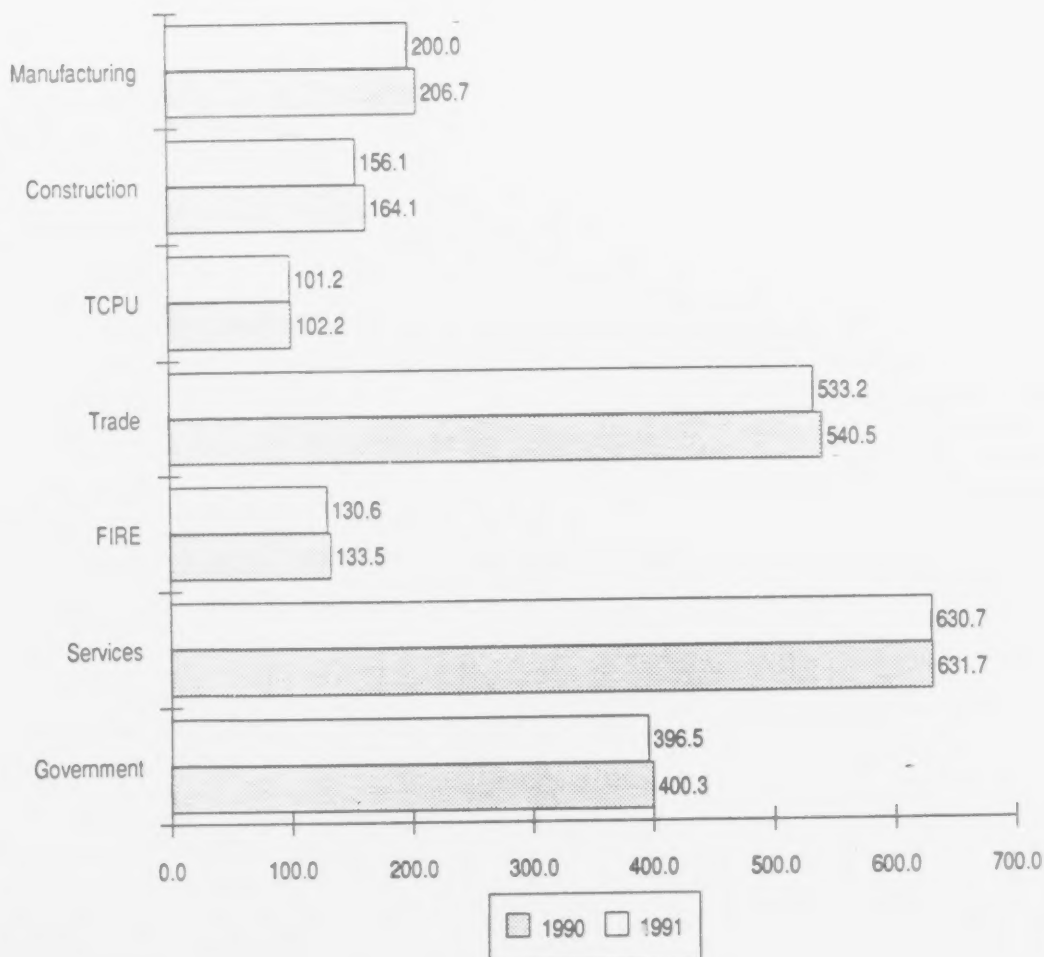
In the public sector, seasonal declines continued to diminish payrolls during August. About 9,600 fewer jobs were reported, with cutbacks occurring on federal and local levels. Declines were most prominent in local government where the end of summer school sessions reduced staffing needs on the education side and cutbacks in summer maintenance and recreation programs pared municipal payrolls.

Lastly, in manufacturing, while employment rose by about 4,400 jobs over the month, slightly more than three-fourths of this gain resulted from recall activity rather than from actual new job generation. The settlement of strike activity in the transportation equipment and beverage industries restored about 3,000 jobs to manufacturing payrolls. Recall activity following vacation shutdowns also caused employment to rise in apparels and furniture manufacturing. On a more positive note, increased business activity was reported in the printing and publishing industry. Overall employment in the manufacturing industry, currently at 200,000, is trailing well behind last August's level of 206,700.

Production workers employed in the manufacturing industry during August earned, on average, a weekly paycheck of \$488.78 for a 40.8 hour workweek. In durable goods, workweeks rose by about

0.2 hours and hourly pay rates increased by \$.55, adding just over \$13.50 to weekly paychecks. Among durable goods producers, movements in hours and earnings were mixed. The largest increase in work schedules occurred in miscellaneous manufacturing industries where employers lengthened workweeks by about 2.2 hours. This increase in hours, coupled with a \$.48 rise in hourly rates, added more than \$40.00 to worker paychecks. In nondurables, workweek and earnings measurements remained virtually unchanged at 39.6 hours and \$11.37, respectively. Workweeks, however, were scaled back in all nondurable lines with the exception of printing and chemical products. In printing, workweeks were lengthened by 1.0 hour and, in chemicals, overtime schedules increased slightly with the addition of 0.2 hours. While working longer hours, workers in the chemical industry saw their weekly paychecks shrink as hourly rates dropped from \$12.65 to \$12.46.

NONAGRICULTURAL EMPLOYMENT BY INDUSTRY AUGUST 1990 AND AUGUST 1991



MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
AUGUST 1991

Industry	August 1991	July 1991	August 1990
TOTAL NONAGRICULTURAL EMPLOYMENT	2,150.5	2,160.5	2,180.5
Goods Producing	358.3	354.2	372.9
Mining	2.2	2.1	2.1
Construction	156.1	156.5	164.1
Heavy Construction	18.5	18.9	20.3
Manufacturing	200.0	195.6	206.7
Durable Goods	102.1	99.3	108.6
Lumber & Wood Products	4.1	4.0	4.2
Stone, Clay, & Glass Products	8.3	8.3	8.5
Concrete, Gypsum, Plaster	5.2	5.2	5.4
Other Stone, Clay, & Glass	3.1	3.1	3.1
Primary Metal Industries	10.2	10.1	10.8
Blast Furnaces	8.5	8.4	9.1
Fabricated Metal Products	9.8	9.8	9.9
Fabricated Structural Metal Products	4.1	4.1	4.2
Other Fabricated Metal Products	4.6	4.6	4.6
Industrial Machinery	15.4	15.4	16.2
Refrigeration & Service Mach.	2.0	2.1	2.3
Other Industrial Machinery & Equipment	9.3	9.3	9.4
Electronic Equipment	14.3	14.4	15.5
Communications Equipment	4.2	4.3	4.4
Electronic Component	3.5	3.5	3.9
Other Electronic Equipment	6.6	6.6	7.2
Transportation Equipment	12.5	9.9	13.8
Motor Vehicles	5.1	2.3	5.5
Other Transportation	3.0	3.2	3.5
Instruments & Related	21.9	22.0	24.1
Miscellaneous Manufacturing	2.7	2.6	2.7
Nondurable Goods	97.9	96.3	98.1
Food & Kindred Products	25.3	25.2	25.5
Meat Products	6.0	5.8	5.8
Beverages	3.9	4.3	4.1
Other Food & Kindred	10.4	10.2	10.5
Textile Mill, Apparel	10.0	9.6	10.2
Paper & Allied Products	9.6	9.5	9.6
Printing & Publishing	28.8	28.0	28.5
Chemicals and Allied Products	13.6	13.6	13.7
Rubber & Miscellaneous	8.6	8.3	8.5
Other Nondurable Goods	2.0	2.1	2.1

Industry	August 1991	July 1991	August 1990
Service Producing	1,792.2	1,806.3	1,807.6
Transportation & Public Utilities	101.2	101.2	102.2
Transportation	56.3	56.2	57.6
Railroad Transportation	4.4	4.4	4.7
Trucking & Warehousing	29.1	29.2	29.2
Communications & Utilities	44.9	45.0	44.6
Communications	28.1	28.2	28.4
Electric, Gas, Sanitary	16.8	16.8	16.2
Trade	533.2	534.1	540.5
Wholesale Trade	108.0	108.2	110.3
Retail Trade	425.2	425.9	430.2
Building Materials, Garden Supplies	17.5	17.9	17.8
General Merchandise	43.4	43.4	45.0
Food Stores	66.3	66.2	67.1
Eating & Drinking Places	142.2	142.7	141.4
Finance, Insurance, & Real Estate	130.6	131.2	133.5
Finance	56.9	57.3	59.2
Depository Institutions	42.2	42.4	43.6
Commercial Banks	27.3	27.4	28.2
Insurance	38.9	39.1	38.9
Insurance Carriers	25.8	25.9	25.6
Real Estate	34.8	34.8	35.4
Services	630.7	633.7	631.1
Business Services	134.1	134.5	136.6
Health Services	164.3	164.0	159.2
Hospitals	80.8	80.9	78.1
Legal Services	16.3	16.5	16.5
Educational Services	31.1	31.4	30.9
Private Colleges, Universities	16.5	16.5	16.1
Total Government	396.5	406.1	400.3
Total Federal Government	133.9	134.5	135.3
Department of Defense	48.1	48.5	47.2
Other Federal Government	85.8	86.0	88.1
Total State & Local Government	262.6	271.6	265.0
Total State Government	95.2	93.4	94.0
State Education	27.8	26.1	26.5
Other State Government	67.4	67.3	67.5
Total Local Government	167.4	178.2	171.0
Local Education	89.0	95.5	92.0
Other Local Government	78.4	82.7	79.0

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding

Current data preliminary; previous month revised

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES

AUGUST 1991

Industry	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	August 1991	July 1991	August 1991	July 1991	August 1991	July 1991
MARYLAND						
Manufacturing	40.8	40.8	\$488.78	\$476.95	\$11.98	\$11.69
Durable Goods	42.2	42.0	533.83	508.20	12.65	12.10
Lumber and Wood Products	39.4	39.0	350.66	341.25	8.90	8.75
Stone, Clay, and Glass Products	44.3	44.6	508.56	511.12	11.48	11.46
Primary Metal Industries	44.8	43.6	755.33	726.81	16.86	16.67
Blast Furnaces	45.5	44.2	777.60	743.00	17.09	16.81
Fabricated Metals	40.6	40.4	443.35	439.55	10.92	10.88
Industrial Machinery	41.2	41.7	522.00	532.51	12.67	12.77
Electronic Equipment	45.8	45.8	438.31	433.27	9.57	9.46
Transportation Equipment	38.6	39.2	632.27	505.68	16.38	12.90
Instruments and Related Products	42.2	40.9	565.48	539.88	13.40	13.20
Miscellaneous Manufacturing Industries	42.2	40.0	421.16	380.00	9.98	9.50
Nondurable Goods	39.6	39.7	450.25	450.20	11.37	11.34
Food and Kindred Products	39.4	40.3	403.06	416.70	10.23	10.34
Textile Mill, Apparel	36.6	36.8	292.80	301.02	8.00	8.18
Paper and Allied Products	42.0	42.9	493.50	506.22	11.75	11.80
Printing and Publishing	37.4	36.6	532.95	506.91	14.25	13.85
Chemicals and Allied Products	42.1	41.9	524.57	530.04	12.46	12.65
Rubber and Plastic Products	41.7	41.8	419.09	420.09	10.05	10.05
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.3	41.4	\$518.32	\$502.60	\$12.55	\$12.14
Durable Goods	41.9	42.2	559.37	533.83	13.35	12.65
Nondurable Goods	40.7	40.6	477.00	472.99	11.72	11.65

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Labor force patterns in the Metro Area were similar to those statewide in that the actual number of unemployed declined yet the jobless rate remained unchanged at 6.2 percent. Locally, unemployment trends were mixed. The most noteworthy movements occurred in Carroll County where a rapidly declining labor force reduced joblessness from 5.1 percent to 4.5 percent and, in Queen Anne's County where unemployment rose in response to employment declines in the vegetable and seafood processing industries. Baltimore City's unemployment rate, at 9.0 percent in August, although considerably below its recessionary peak of 10.0 percent, was the highest rate reported locally. In Baltimore County, layoff activity of note was reported in manufacturing and transportation. Regionally, seasonal employment declines were heaviest in local government. Scattered hiring was, however, reported in amusements, business services, hotels and apparel stores.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. suburbs, labor market conditions appeared relatively low key during August. Employment declines did result in a marginal increase in the number of unemployed, however, this increase was not substantial enough to move the jobless rate from July's level of 4.2 percent. Within the area, Frederick was the only county to show any measurable activity. The number of unemployed in the county declined by about 265 over the month, easing the jobless rate down from 5.1 percent to 4.8 percent. With this decline, Frederick's jobless rate tumbled below last August's estimate by 0.5 percentage points. Activity on the region's industrial payrolls reflected cutbacks across each industry sector, with the largest declines reported in services and government. In services, legal and engineering services accounted for about 50.0 percent of the industry downturn and, in government, seasonal layoffs at the local level were the primary source of the monthly decline.

WESTERN MARYLAND

In the Western region, a decline of 0.5 percentage points reduced joblessness to 7.7 percent in August. While labor force declines were, in part, responsible for absorbing employment losses and lowering unemployment, recall activity in manufacturing was also an underlying factor. Unemployment in the western counties, while still the highest statewide, is almost a full percentage point below last August's rate of 8.5 percent. Since August 1990, employment in the region has risen by about 1,100 while the jobless count has declined by about 820. Locally, unemployment dropped back in each of the region's jurisdictions, with the largest decline, from 9.6 percent to 8.5 percent, occurring in Garrett County. A slight shrinkage was noted in Garrett's labor force during August, however, rising employment was the primary factor responsible for reducing countywide unemployment. The benefit of recall activity was reflected on the region's industrial payrolls which showed an increase of 300 jobs in the manufacturing sector.

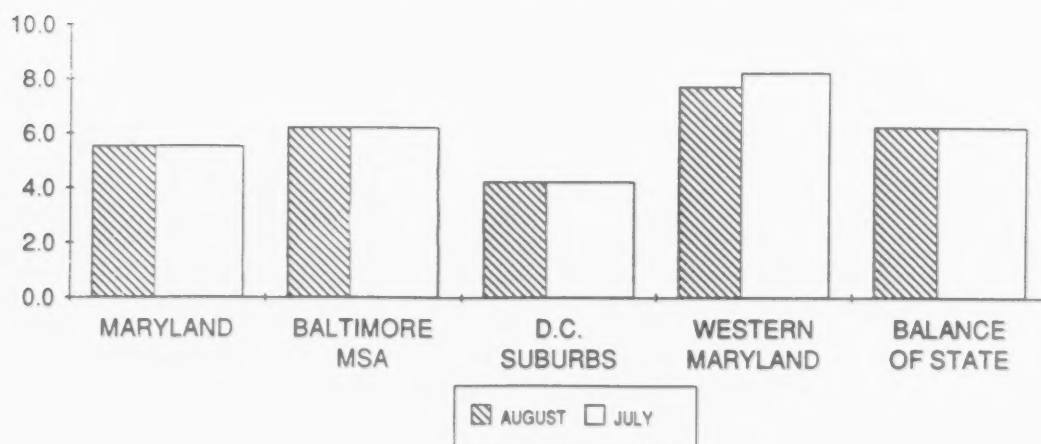
BALANCE OF STATE

On the Eastern Shore and in Southern Maryland, unemployment held at 6.2 percent in August. On a county-by-county basis, however, seasonal fluctuations were apparent. In both Dorchester and Kent counties, employment rose and unemployment declined as workers returned to manufacturing plants following vacation shutdowns. Unemployment, on the other hand, rose noticeably in both Somerset and Talbot counties. In Somerset, early layoffs in the seafood processing industry increased the burden of seasonal economics in the county, causing joblessness to rise from 7.4 percent to 7.9 percent. Talbot County's labor market was depressed by temporary layoffs in the printing industry. The unemployment rate in Talbot, while remaining one of the lowest in the region, rose to 4.8 percent in August, up from July's rate of 3.9 percent.

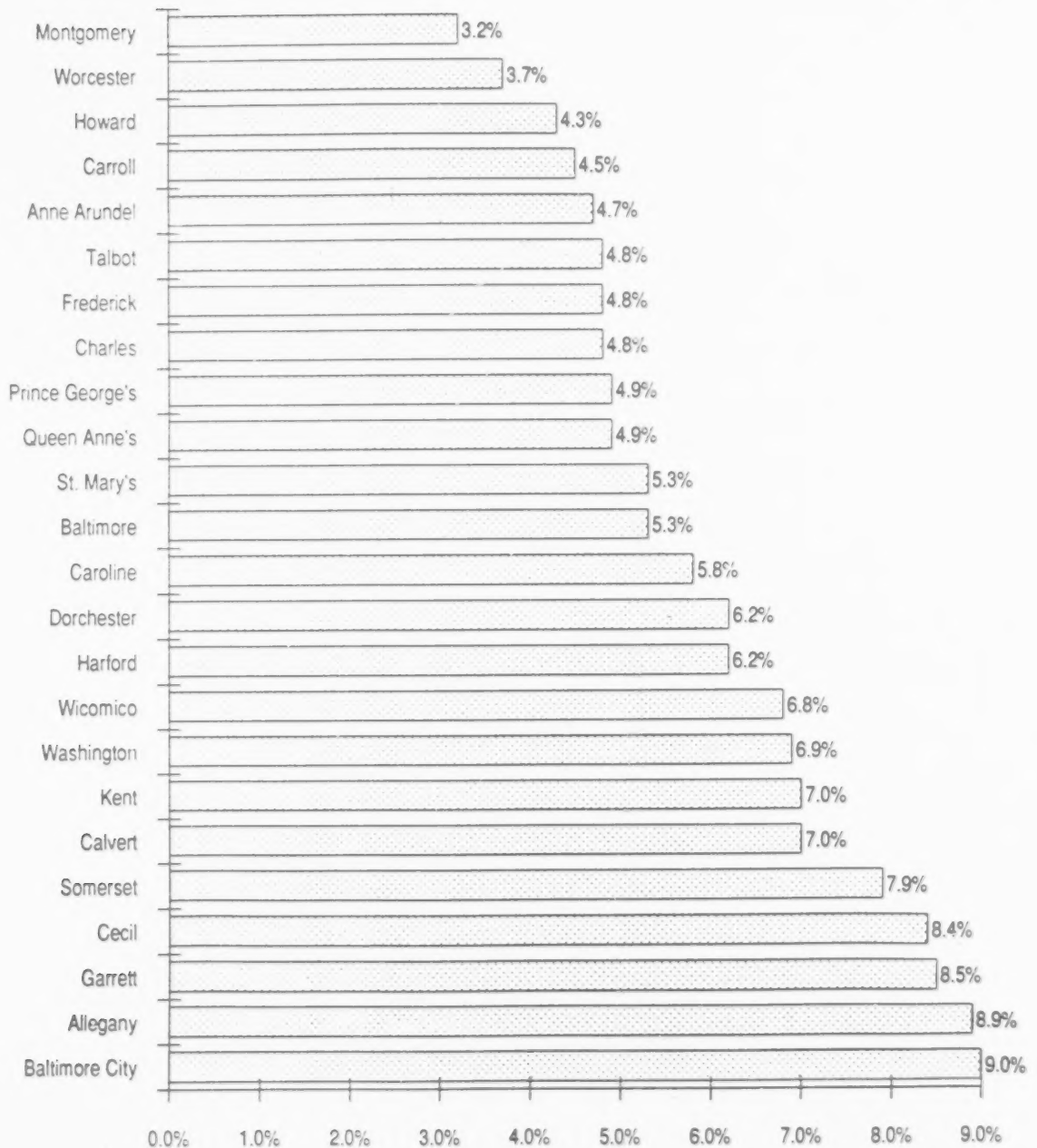
TOTAL UNEMPLOYMENT-MARYLAND AND REGIONS

	AUGUST 1991		JULY 1991	
	NUMBER	RATE	NUMBER	RATE
MARYLAND	142,359	5.5	144,119	5.5
BALTIMORE METROPOLITAN AREA	76,659	6.2	77,525	6.2
MARYLAND'S D.C. SUBURBS	43,197	4.2	43,174	4.2
WESTERN MARYLAND	8,525	7.7	9,207	8.2
BALANCE OF STATE	13,978	6.2	14,214	6.2

UNEMPLOYMENT RATES - AUGUST 1991



LOCAL UNEMPLOYMENT RATES-AUGUST 1991



STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE
AUGUST 1991

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	AUGUST	JULY*	AUGUST	JULY*	AUGUST	JULY*	AUGUST	JULY*	AUG. 1990
MARYLAND	2,596,055	2,627,981	2,453,696	2,483,862	142,359	144,119	5.5	5.5	5.0
BALTIMORE METROPOLITAN AREA	1,240,460	1,259,840	1,163,801	1,182,315	76,659	77,525	6.2	6.2	5.4
BALTIMORE CITY	354,783	360,149	322,862	327,998	31,921	32,151	9.0	8.9	8.3
ANNE ARUNDEL	220,679	224,149	210,229	213,573	10,450	10,576	4.7	4.7	3.8
BALTIMORE	401,196	407,451	380,063	386,109	21,133	21,342	5.3	5.2	4.8
CARROLL	64,557	65,998	61,681	62,663	2,876	3,335	4.5	5.1	3.6
HARFORD	86,177	87,399	80,838	82,124	5,339	5,275	6.2	6.0	4.9
HOWARD	96,711	98,179	92,569	94,041	4,142	4,138	4.3	4.2	3.3
QUEEN ANNE'S	16,359	16,519	15,560	15,808	799	711	4.9	4.3	3.2
D. C. AREA	1,018,754	1,027,729	975,557	984,555	43,197	43,174	4.2	4.2	3.8
CALVERT	24,353	24,616	22,652	22,861	1,701	1,755	7.0	7.1	4.7
CHARLES	48,827	49,220	46,476	46,904	2,351	2,316	4.8	4.7	3.5
FREDERICK	78,897	79,853	75,079	75,771	3,818	4,082	4.8	5.1	5.3
MONTGOMERY	435,178	439,052	421,197	425,082	13,981	13,970	3.2	3.2	3.0
PRINCE GEORGE'S	431,498	434,988	410,153	413,936	21,345	21,052	4.9	4.8	4.4
WESTERN MARYLAND	110,527	111,648	102,002	102,441	8,525	9,207	7.7	8.2	8.5
ALLEGANY	33,308	33,582	30,335	30,475	2,973	3,107	8.9	9.3	9.7
GARRETT	14,744	14,784	13,490	13,365	1,254	1,419	8.5	9.6	8.3
WASHINGTON	62,475	63,282	58,177	58,601	4,298	4,681	6.9	7.4	7.8
BALANCE OF STATE	226,314	228,766	212,336	214,552	13,978	14,214	6.2	6.2	6.0
CAROLINE	14,863	15,030	14,002	14,158	861	872	5.8	5.8	4.7
CECIL	37,033	37,645	33,936	34,518	3,097	3,127	8.4	8.3	7.4
DORCHESTER	17,761	17,749	16,656	16,485	1,105	1,264	6.2	7.1	6.3
KENT	9,879	10,016	9,192	9,160	687	856	7.0	8.5	5.7
ST. MARY'S	44,814	45,278	42,421	42,837	2,393	2,441	5.3	5.4	4.9
SOMERSET	14,024	14,607	12,912	13,520	1,112	1,087	7.9	7.4	9.4
TALBOT	18,071	17,950	17,211	17,245	860	705	4.8	3.9	6.0
WICOMICO	40,816	40,666	38,041	37,970	2,775	2,696	6.8	6.6	6.6
WORCESTER	29,053	29,825	27,965	28,659	1,088	1,166	3.7	3.9	3.9
UNITED STATES**	126,097,000	127,327,000	117,859,000	118,751,000	8,237,000	8,576,000	6.5	6.7	5.4

*Estimates for the state are revised.

**Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY--BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
BY REGION--AUGUST 1991

Industry	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	August 1991	July 1991	August 1991	July 1991	August 1991	July 1991	August 1991	July 1991
Total Nonagricultural Employment	1,138.6	1,144.2	767.0	770.5	93.1	93.1	149.9	149.8
Goods Producing	199.0	196.6	100.8	101.2	22.2	21.9	34.3	33.5
Mining	0.5	0.5	0.5	0.5	0.8	0.8	0.2	0.2
Construction	74.1	74.2	64.9	65.2	5.6	5.6	10.3	10.3
Manufacturing	124.4	121.9	35.4	35.5	15.8	15.5	23.8	23.0
Durable Goods	68.5	65.8	17.7	17.7	7.2	7.0	8.6	8.5
Nondurable Goods	55.9	56.1	17.7	17.8	8.6	8.5	15.2	14.5
Service Producing	939.6	947.6	666.2	669.3	70.9	71.2	115.6	116.3
Transportation & Public Utilities	56.1	56.4	33.4	33.6	5.2	5.2	7.5	7.5
Trade	265.4	266.1	197.6	198.4	26.7	26.8	41.2	41.3
Wholesale Trade	62.4	62.5	35.0	35.5	5.0	5.1	5.3	5.3
Retail Trade	203.0	203.6	162.6	162.9	21.7	21.7	35.9	36.0
Finance, Insurance, & Real Estate	74.7	75.3	45.9	46.0	3.3	3.3	5.4	5.5
Services	334.9	334.7	237.7	238.7	21.8	21.9	36.9	37.2
Total Government	208.5	215.1	151.6	152.6	13.9	14.0	24.6	24.8
Federal	51.2	51.6	74.1	74.6	1.8	1.8	7.0	7.0
State	71.8	71.5	15.9	14.4	4.2	4.3	4.7	4.6
Local	85.5	92.0	61.6	63.6	7.9	7.9	12.9	13.2

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

UNEMPLOYMENT COMPENSATION

	August 1991	July 1991	August 1990
Initial Claims	21,194	34,741	22,326
Weeks Claimed	258,505	316,652	160,821
First Payments	10,062	13,048	8,512
Final Payments	6,177	7,420	2,361
Weeks Paid	199,606	241,441	119,823
Net Benefit Amount	\$35,810,212	\$42,958,465	\$20,414,492
Average Check Amount	\$179.40	\$177.93	\$170.37

Following a sharp increase in July, claims activity at Maryland's local unemployment offices declined markedly in August, with reductions noted in each of the monthly workload measurements. Initial claims fell by nearly 40 percent, or by 13,547. With this decline, the number of initial claims filings dropped to its lowest level since the onset of the recession. More importantly, this is the first time this year that initial claims filings have been lower than year ago totals. In similar fashion, a drop of about 23 percent in the number of weeks claimed reduced the total count in this category to a 1991 low of 258,505. Weeks claimed, unlike initials, remained well above its year ago level of 160,821.

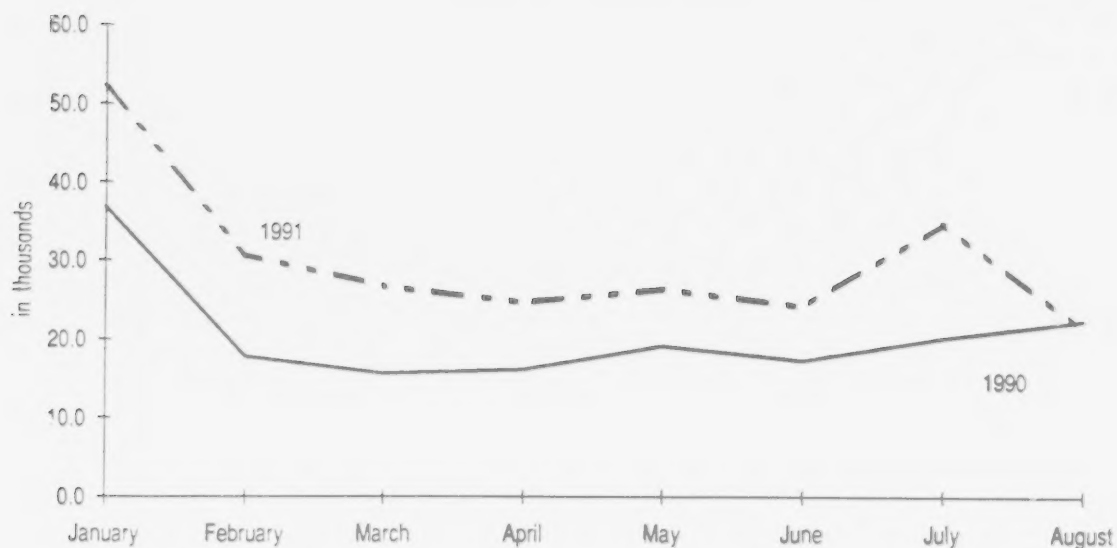
Slightly more than three-fourths of all claims filed during August resulted in compensation, with payments averaging about \$179.40, up from July's benefit check of \$177.93. While weekly benefit checks were higher, a decline of more than 41,800 in the number of weeks paid reduced the net benefit outlay by nearly \$7.2 million over the month to \$35.8 million in August. In all, about 6,177 final payments were issued during August, down from July's figure of 7,420 but more than two and a half times higher than August 1990's estimate of 2,361.

REGIONAL INDICATORS AUGUST 1991

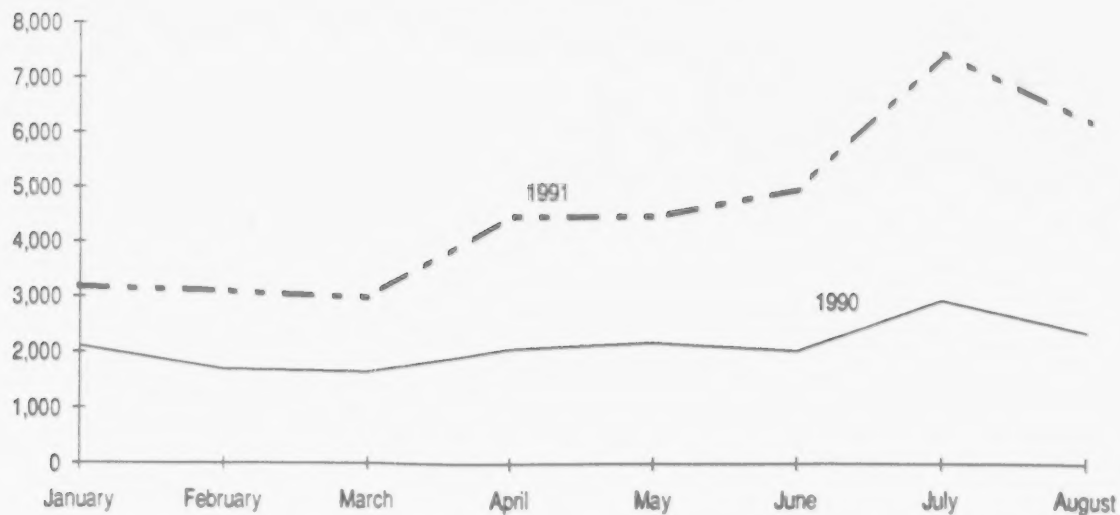
	BMA	DC Suburbs	Western Maryland	Balance of State
First Payments	5,432	2,556	531	778
Final Payments	3,546	1,389	370	406
Weeks Paid	107,524	48,653	12,207	15,112
Average Check Amount	\$178.90	\$187.27	\$162.08	\$157.05

Claims activity declined across the state's four regions. The largest reductions occurred in the Western region where a drop of nearly 28 percent in weeks paid and 43.7 percent in final payments lowered counts in these categories to 12,207 and 370, respectively. While each region reported fewer numbers of exhaustions during August, there were four local offices with higher numbers of final payments. In the BMA, exhaustions rose in Annapolis, Towson, and Ellicott City while in the Balance of State area, final payments increased in Chestertown. For those claimants receiving benefits, check amounts rose in each region except in Western Maryland where a drop of \$1.31 lowered August's weekly payment to \$162.08.

INITIAL CLAIMS JANUARY-AUGUST 1991



FINAL PAYMENTS JANUARY-AUGUST 1991



 Maryland
Department of Economic &
Employment Development

OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
Baltimore, Maryland 21201



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